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SASKATCHEWAN HORSE INDUSTRY MARKET RESEARCH STUDY

Funded by
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SASKATCHEWAN HORSE INDUSTRY PROFILE STUDY

by

Vel Evans

SASKATCHEWAN HORSE INDUSTRY PROFILE STUDY

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- ❖ Primary objective: To develop a profile of the Saskatchewan horse industry
- ❖ Research format included direct telephone interviews with adult horse industry participants only
- ❖ Supporting resource and research materials included Statistics Canada data, published statistics from breed registries, Canadian Livestock Registry, 1998 Canadian Horse Industry Study
- ❖ Data validity for the study, +/- 2.3% 19 out of 20 times
- ❖ Reporting format for the statistical data includes total, percentage of maximum sample, median, and mode where applicable

INTRODUCTION ...

The horse industry occupies a unique position within the Saskatchewan agricultural sector. The 20th century witnessed a major shift in the uses of horses within the economy. The historical role of horses as "working" animals supporting general economic (and agricultural) activity in the province has been supplanted by a 21st century role which effects diverse economic & social impact.

The Saskatchewan Horse Federation commissioned this market research on behalf of industry stakeholders to profile and describe the 2001 Saskatchewan horse industry. Study design, completion of all described research phases, and preparation of this report were the sole responsibility of Strategic Equine Marketing. This report was authored by Vel Evans, principal consultant for SEM.

1.1. Research Objectives

The primary research objective of this market study was to develop a profile of the Saskatchewan horse industry in its diversity, specifically:

- ❖ Participation profile of the people involved (owners, riders, drivers)
- ❖ Participation profile of the horses involved, including number & use of horses in the province
- ❖ Profile of land usage related to equines, for pasture, forage, feed production
- ❖ Market profile for products & services currently offered by horse owners in the province

1.2. Research Format & Time Frames

The research was completed through three phases:

- ❖ Direct interviews by telephone with executives representing associations, facilities managers, riding groups and event organizers
- ❖ Direct interviews by telephone with individual horse owners, riders and drivers resident in Saskatchewan, 18 years-of-age and older
- ❖ Literature review of available research on the Saskatchewan horse industry

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From information provided by the Saskatchewan Horse Federation, the provincial "crop districts" used by Saskatchewan Agriculture & Food, were mapped against the "sport" administrative regions used by Saskatchewan Sport, to define eight geographic regions for the province. Sample selection and related data analysis was completed for each of the defined regions, as well as for the provincial industry as a whole.

Telephone interviews were completed during October & November 2001. The questionnaire interviews, which averaged approximately twenty minutes in length, were completed by a total of 460 individual industry participants from all eight regions of the province.

Individuals surveyed participated on a strictly volunteer basis. No incentives of any kind were offered to participants.

1.3. Sample size / selection

Direct telephone interviews were completed with representatives of 105 different horse/riding clubs, breed & industry associations, and agricultural societies. Contact information for association representatives was as provided by the Saskatchewan Horse Federation, from their current membership list.

In total, 355 interviews were completed with "individual" provincial industry participants, representing approximately 6.1% of the estimated number of Saskatchewan adults who belong to a horse-related group or association. The sample was randomly selected from a composite list of names created from membership lists provided by the Saskatchewan Horse Federation, breed and discipline associations, published directories and commercial subscription/mailing lists.

Sample selection was "weighted" to reflect the relative distribution of horses on farms in the province, based on the eight regions as defined. The proportion of the total sample completed for each region is as follows:

TABLE 1.1: Number of Interviews Completed Per Region

	1996 STATS CANADA CENSUS DATA		ADULT MEMBERSHIP SHF		2001 MARKET PROFILE STUDY	
PROVINCIAL CROP REGION / SPORT REGION	# OF CENSUS FARMS WITH HORSES	% OF PROVINCIAL TOTAL	# OF ADULT MEMBERS	% OF PROVINCIAL TOTAL	# OF INTERVIEWS COMPLETED	% OF TOTAL SAMPLE POOL
REGION 1	1,447	15.3%	625	19.2%	58	16.3%
REGION 2	29	0.3%	281	8.9%	30	8.5%
REGION 3	2,391	25.24%	478	14.7%	58	16.1%
REGION 4	871	9.2%	228	7.0%	28	7.9%
REGION 5	1,381	14.6%	521	16.0%	53	15.0%
REGION 6	257	2.7%	249	7.6%	23	6.5%
REGION 7	1,807	19.1%	491	15.1%	59	17.0%
REGION 8	1,289	13.6%	374	11.5%	46	13.0%
TOTALS	**9,472**	**100%**	**3,247**	**100**	**355**	**100%**

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1.4. Questionnaires & Response Analysis

The questions asked during telephone interviews covered four broad categories of information:

- **Horse Ownership** – to develop profile information for the Saskatchewan equine herd
- **General Demographics** – to develop general demographic information on industry participants
- **Industry Participation** – to develop participation profiles of industry participants
- **Economic Factors** – to develop data on the economic impact of the industry to the provincial economy

1.4.1. Qualification of Responses

The "individual participant" survey sample was restricted to people 18 years-of-age or older. Respondents were defined as industry participants if they met one or more of the following three criteria:

- They ride or drive horses, *or*
- They own horses, either individually or as part of a syndicate ownership group, *or*
- They are responsible for the care of other peoples' horses

Individuals interviewed were asked to define their type of participation in the industry, through their response to Question **50.0** and Question **51.0**:

*"**50.0** Which of the following categories describes your participation in the industry? Please choose as many categories as apply ...*

50.1 Coach/trainer/riding instructor

50.2 Farm/stable or ranch manager

50.3 Breeder

50.4 Service provider to the industry (farrier, veterinarian, equine dentist, equine therapist, etc.)

50.5 Pleasure rider

50.6 Competitor

50.7 Show organizer, judge or official

50.8 You provide/sell products to the horse industry (tack shop owner, feed mill manager, etc.)" ... AND

*"**51.0** Which of these categories BEST DESCRIBES your participation? Please choose one."*

In **Section 6: Statistical Data**, the responses to Question **50.0** are reported in each of the sub-set "region" reports, as a reflection of the diversity of participation in each region of the province. The responses to Question **51.0** form the basis of the "participation" reports.

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If, for any reason, the person being interviewed did not want to answer a particular question or sub-question, the interviewer continued on with the next question. Questionnaires were considered complete if more than 85% of the required or possible questions were answered. Overall, questionnaire completion exceeded 92%.

In **Section 6: Statistical Data** reports, "NO RESPONSES" are ignored in the calculation of the relevant percentages. Due to rounding, reported totals may not add up to 100.00%.

1.4.2. Reporting Format

All questions asked were of three basic types:

- ❖ Questions that required a "YES" or "NO" response
- ❖ Questions that required a numeric response ("How Many")
- ❖ Questions that required a ranking (or grading) response – asking the respondent to rank "From 1 to 5", or "From 1 to 10"

Questions were asked in "nesting format". Depending on the response to a given question, interview participants were asked a different series of questions. The tables of data included in **Section 6: Statistical Data** report the "% OF SAMPLE", based on the number of people who responded "YES" to a question, divided by the number of people who COULD HAVE responded to the question.

For example, if 150 people were asked …

*"**10.0** Do you own mares of breeding age? ☐ YES ☐ NO"*

And 100 respondents answered YES, and 50 respondents answered NO …

100 YES respondents were asked *"**10.A.1** How many mares of breeding age? _____"*

50 NO respondents were asked: *"**10.B.1** Do you expect to own and breed mares in the next 5 years?"*

The "MAX. SAMPLE" for Question **10.0** = 150, for Question **10.A.1** = 100, and the "MAX. SAMPLE" for Question 10.B.1 = 50.

Where a particular set of responses are highlighted in bold, (e.g. age range, income level) it represents the "MEDIAN" response to the questions. The median response represents the mid-point of the sample – the point at which 50% of the sample falls below, and 50% sits above.

When individual respondents were asked to "RANK" their agreement with a statement, or rank the importance of an issue, the tables report the total of all responses (i.e. adding together all of the "1", "2", "3", "4", "5", … responses) under "TOTAL SCORE". The "RANKING" column reports how the responses are ranked relative to each other.

1.4.3. Validity

Not including interviews with club/association representatives, in total, 355 interviews were completed, representing approximately 6.1% of the estimated number of Saskatchewan adults who belong to a horse-related group or association, province-wide. At this sample size, the accuracy of the data acquired and the validity of the analysis of responses represents +/- 2.3%, 19 out of 20 times – roughly equivalent to 97.5% accuracy.

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Strategic Equine Marketing

- ❖ Saskatchewan equine herd numbers approximately 95,000
- ❖ Those horses are owned by 12,000 horse owners
- ❖ Each year, an additional 12,800 "non-owners" ride or drive horses in Saskatchewan
- ❖ "Direct employment" in the care of horses, providing services to horse owners, or at horse-related facilities totals 1,163,488 hours paid employment per year – the equivalent of 582 full-time jobs
- ❖ Horse-related activities represent 50% or more of total annual income for 1,159 Saskatchewan horse owners, 173 provincial veterinarians, and 150 farriers

2.0. DEFINING THE INDUSTRY ...

Unlike other livestock commodity groups, the majority of horses experience a long and varied productive life generating economic value for their owners and the community, prior to their contribution to the red-meat food chain. The majority of the "value" to the provincial horse industry lies in the "live use" of the horse, as part of the sport, recreation, human health, and entertainment sectors of the provincial economy.

Activities with horses drive value and economic contribution. For the racing and competition sector, success in competition increases the market value of breeding stock and their progeny. In the recreation and tourist sectors, supply & demand for riding activities impacts market value for riding horses.

It is the diversity of activity of horses and their owners, riders & drivers that presents the challenge in defining the size and scope of the provincial industry. For the purposes of this study, the model developed to determine the size, scope and economic impact of the "live use" of horses in the province, measures:

- ❖ People directly involved with horses (owners, riders, drivers, those employed in horse care)
- ❖ The Horses involved and what they are used for (defining the "primary use" for horses)
- ❖ The activities in which people & horses participate (employees of race tracks, show facilities, spectators at horse shows, etc.)

2.1. People & Horses

2.1.1. Owners, Riders & Drivers

The total sample size of 355 respondents represents individual adult Saskatchewan residents defined as participants in the horse industry through one or more of the following criteria:

- ❖ They ride or drive horses, *or*
- ❖ They own one or more horses either directly or through an ownership syndicate, *or*
- ❖ They are responsible for the care of one or more horses belonging to other people.

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Of the 355 survey respondents,

- ❖ 96% of total sample ride or drive horses
- ❖ 95% of total sample own horses
- ❖ 24% of total sample are responsible for the care of other peoples' horses

Owners/Riders/Drivers Represented: Survey respondents were asked how many adults and children in their household ride or drive horses. In addition to the 355 adults interviewed, households in which respondents live include an additional 541 adults who ride or drive horses, and 269 children who ride or drive

- ❖ The survey directly represents 355 adult rider/drivers, or horse care-givers
- ❖ The survey indirectly represents an additional 810 Saskatchewan residents who ride or drive and are resident in the households of those surveyed

Horses Represented: Of the 355 survey participants, 95% of respondents own horses, either directly, or through syndicate ownership. These 337 individuals own a 100% interest in 4,375 horses, an additional percentage interest in 37 horses owned through syndication, and are responsible for the care of 878 horses belonging to other people

- ❖ The survey directly represents 4,375 horses owned by survey participants
- ❖ The survey indirectly represents an additional 37 horses owned through syndication, and 878 horses belonging to other people, but cared for by survey participants

Those who own or care for horses represent the visible sector of the industry. They are relatively quantifiable, through their membership in breed or discipline associations, magazine subscription lists, horse product catalogue mailing lists, etc. – the source of names for the random sample pool from which survey respondents were selected.

Participation and involvement in the horse industry also involves membership in multiple horse-related associations or organizations. Of total survey respondents, 86% of those surveyed belong to a horse-related group or association. On average, association members surveyed pay annual membership fees to two associations each year, one provincial "chapter" or organization, plus one national or international association related to their sport or discipline.

Membership data for 127 provincial equine/equestrian associations and clubs in the province was compiled from direct interviews with association representatives, and publicly available membership information reports. Direct interviews were completed with 105 executives representing member associations of the Saskatchewan Horse Federation. Association representatives were interviewed by telephone during September through November 2001. Interview respondents were asked to provide membership information for their 2001 membership year, including categories of membership, numbers of members in each category, as well as membership fees collected.

In addition to membership information collected through direct interviews, data was tabulated from available resources for Saskatchewan membership in the following associations/clubs:

- ❖ Saskatchewan 4-H Council
- ❖ Canadian Pony Club - Saskatchewan Region

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- Seventeen (17) breed-associations which maintain their membership records through the Canadian Livestock Records Corporation
- Saskatchewan membership in the American Quarter Horse Association
- Saskatchewan membership in the American Paint Horse Association, and
- provincial racing sector, including membership in the Canadian Thoroughbred Horse Society, Standardbred Canada, and the Saskatchewan chapter of the HBPA (Horsemen's Benevolent Protective Association).

TABLE 2.1: Number of members of associations in Saskatchewan

TOTAL # MEMBERS all sources		Duplicate membership ... within province**	Net Total Membership in provincial associations
Adult Members	14,175	-5,786	8,389
Junior/Youth	3,408	-793	2,615
TOTALS	**17,583**	**-6,579**	**11,004**

****NOTE**: For formula used for calculation of duplicate membership, as follows:

$$\text{TOTAL} = \frac{\text{SAMPLE}}{[(1-\%\text{DUP}) + (\%\text{DUP} \times \#\text{DUP})]}$$

WHERE:

SAMPLE = total number of all members of associations

%DUP = % of total sample that belong to 2 or more associations

#DUP = #(%) of respondents belonging to each sub-set of multiple associations (i.e. % who belong to 2 associations, % who belong to 3 associations, % who belong to 4 associations, etc.)

Additional calculations were required to determine the number of "horse owners" in the province.

Of the individuals interviewed 86% belonged to an equine/equestrian related club or association, of whom, 95.4% reported owning horses. Of those interviewed, 14% are not current (adult) members of a club or association. Applying the percentage of adult "non-club-members" to the club member totals, calculates a total pool of horse owners in Saskatchewan.

TABLE 2.2: Estimated Number of Horse Owners (Club Member Calculation)

Adult club members who own horses	8,389
Adults "non club members" who own horses	1,266
TOTAL Estimated # ADULT horse owners	**9,655**
Junior club members who own horses	2,615
TOTAL Estimated owners "Club Member" method	**12,270**

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During the census process, Statistics Canada records the number of equines resident on farms on census day, where a "farm" is defined as a property that produces more of an agricultural product than the property or facility consumes: i.e. produces agricultural products for sale. If a property qualifies as a "census farm," all livestock on the property are counted, regardless of ownership. Census data reports "horses-per-site" for census farms.

However, because census counts for equines are restricted to those resident on farms, horses resident on properties which do not qualify as census farms are not included in census totals. Such properties would include facilities offering only "boarding services", or riding lessons, or trail ride operations or small acreages.

Statistics Canada reported 66,372 equines resident on 9,472 "farms" in Saskatchewan on 1996 Census Day. *(NOTE: At the time of preparation of this report, data for 2001 Census Day was not available).*

During interviews, individuals were asked:

"25.0 Do you live on the same property as the horses you own?", and

"28.0 Was the property counted as a "farm" in the Census?"

Survey participants who have owned horses for five years or more (i.e. those that were horse owners in 1996), reported that only 53% resided on a property which met the Statistics Canada criteria for a "census farm". If we assume that each census farm reporting horses on Census Day represents at least one adult horse owner, applying the data for horse owners surveyed that were not included in the 1996 Census total:

TABLE 2.3: Estimated Number of Horse Owners (Census Farm Calculation)

Horse owners on census farm property (# of farms reported)	9,472
Horse owners not resident on census farms	2,719
TOTAL estimated horse owners	**12,191**

For the purposes of this analysis, it is estimated that there are 12,000+ Saskatchewan horse owners, including 9,655 adult owners and 2,345 junior owners. Of adult Saskatchewan horse owners, approximately 8,400 belong to at least one provincial equine/equestrian club or association.

2.1.2. Horses ... Estimated Provincial Herd Size

Survey respondents were asked:

"2.0 How many horses do you or family members own 100% interest in?"

Responses to **Question 2.0** were used to estimate the average number of horses owned per family unit or "horse site". The average number of horses owned by category was used to calculate an estimated total herd size for Saskatchewan.

Calculations were applied using two calculation models, "club member" calculation method and "census farm" calculation method.

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"Club Member" Calculation Method...

- ❖ Average number of horses owned per horse owner surveyed was applied to the number of "family units" derived from total provincial membership values, adjusted for family memberships.
- ❖ The percentage of horse owners surveyed who DO NOT belong to a horse-related club or association and the average number of horses owned by them, were applied to the total club membership values, and added to the total.
- ❖ Because of the significant difference in average number of horses owned for the PMU (pregnant mare urine) production sector compared to other sectors, horses in PMU production, and the farms on which they reside were calculated separately

"Club Member" calculation method estimates a provincial herd size of 94,130 horses

"Census Farm" Method...

- ❖ Horse owners surveyed who reported living on census farms in 1996 and 2001, reported an average increase in herd of two horses per owner on a "1996" census farm.
- ❖ Horse owners surveyed who reported owning horses for less than five years were added to the total as "new census farm sites"
- ❖ Owners surveyed who reported that they lived on the same property as the horses they have owned, but also reported that their property was not counted as a "census farm" were added to the total
- ❖ For Horse owners surveyed who reported that they do not live on the same property as their horses, it is assumed that their horses reside on census farms.

"Census Farm" calculation method estimates a provincial herd size of 99,913 horses

TABLE 2.4: Estimated Number of Horses/Equines

"Club Member" Calculation Method	Number of people / sites	Average number of horses owned per owner	Estimated 2001 provincial total
Adult Club members who own horses (excluding PMU horses)	8,292	8.8	72,555
Horses in PMU production	97	78.0	7,566
Adult owners who are non-club members	1,266	9.0	11,394
Junior Club members who own horses	2,615	1.0	2,615
TOTAL "Club Member" calculation method	**12,270**		**94,130**
Census farm sites 1996	**9,472**	**7.0**	**66,672**
Horses on 1996 census farms in 2001	9,472	9.0	85,248
New owners on new census farms	281	3.6	1,012
Owners on property which IS NOT 1996 Census Farm	2,438	5.6	13,653
TOTAL "Census Farm" calculation method	**12,974**		**99,913**

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During the census process, Statistics Canada records the number of equines resident on farms on census day, where a "farm" is defined as a property that produces more of an agricultural product than the property or facility consumes: i.e. produces agricultural products for sale. If a property qualifies as a "census farm," all livestock on the property are counted, regardless of ownership. Census data reports "horses-per-site" for census farms.

However, because census counts for equines are restricted to those resident on farms, horses resident on properties which do not qualify as census farms are not included in census totals. Such properties would include facilities offering only "boarding services", or riding lessons, or trail ride operations or small acreages.

Statistics Canada reported 66,372 equines resident on 9,472 "farms" in Saskatchewan on 1996 Census Day. *(NOTE: At the time of preparation of this report, data for 2001 Census Day was not available).*

During interviews, individuals were asked:

"25.0 Do you live on the same property as the horses you own?", and

"28.0 Was the property counted as a "farm" in the Census?"

Survey participants who have owned horses for five years or more (i.e. those that were horse owners in 1996), reported that only 53% resided on a property which met the Statistics Canada criteria for a "census farm". If we assume that each census farm reporting horses on Census Day represents at least one adult horse owner, applying the data for horse owners surveyed that were not included in the 1996 Census total:

TABLE 2.3: Estimated Number of Horse Owners (Census Farm Calculation)

Horse owners on census farm property (# of farms reported)	9,472
Horse owners not resident on census farms	2,719
TOTAL estimated horse owners	**12,191**

For the purposes of this analysis, it is estimated that there are 12,000+ Saskatchewan horse owners, including 9,655 adult owners and 2,345 junior owners. Of adult Saskatchewan horse owners, approximately 8,400 belong to at least one provincial equine/equestrian club or association.

2.1.2. Horses ... Estimated Provincial Herd Size

Survey respondents were asked:

"2.0 How many horses do you or family members own 100% interest in?"

Responses to **Question 2.0** were used to estimate the average number of horses owned per family unit or "horse site". The average number of horses owned by category was used to calculate an estimated total herd size for Saskatchewan.

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Strategic Equine Marketing

"Club Member" Calculation Method...

- ❖ Average number of horses owned per horse owner surveyed was applied to the number of "family units" derived from total provincial membership values, adjusted for family memberships.
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**NOTE: It should be noted that the 15,057 horses that do not live on the same property as their owners, must be resident on either a "census farm" or a "non-census-farm", i.e. they must be boarded at some farm facility. We have insufficient data to determine which type of property they reside on, subject to the release of the 2001 census data. For the purposes of providing conservative estimates for this report, the author has assumed that the majority of the horses "boarded" are resident on "census farms".

For the purposes of this study, it is estimated that the provincial herd includes 95,000 horses.

2.1.3. Non-Owning Riders/Drivers

The visible sector of the industry, horse owners who belong to clubs & associations, are also responsible for the involvement of a large "invisible" sector – those who regularly ride horses owned by other people (i.e. horses owned by the "visible" sector). Estimates of size of the invisible sector are based on:

- ❖ The number of "other people" (other than owners or family members) who regularly ride/drive the horses owned by survey participants, and
- ❖ The number of horses in the province in use for riding lessons, competition, trail-riding, sleigh rides or other tourist activities

Horse owning survey respondents were asked:

> *"11.0 Do other people, other than yourself and those in your household, regularly ride or drive your horses in lessons, for competition or trail rides? ☐YES ☐NO*
>
> *11.1 How many of your horses are regularly ridden by other people?*
>
> *11.2 How many different people ride your horses in one year?*
>
> *11.2.1 How many are adults?*
>
> *11.2.2 How many are children?"*

The resulting responses generated a total of 853 people riding 256 horses owned by survey participants – 313 adults, and 540 children. Survey data reports an average 3.3 riders per horse in use for lessons, competition, trail rides, etc. Applying the data to totals for the provincial herd, produces an estimate of 13,000 "other non-owning" riders in the province for 2001, as follows:

TABLE 2.5: Estimated Number of "Non-Owning" Riders & Drivers

HORSES PRIMARY USE	# of non-family riders/drivers per horse from sample	Estimated # of horses used by others	Estimated # of non-owing riders or /drivers per year
Competition	3.1	1,405	4,354
Riding lessons	3.4	1,457	4,953
Trail rides & tourist activities	2.6	1,379	3,584
TOTALS		4,241	12,892

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2.1.4. Direct employment

2.1.4.1. Care of Horses:

Although horse ownership and the related care of horses is primarily the responsibility of the owner (and family members), 7.4% of horse owners (those who own 23.4% of the horses) employ non-family members on a part-time or full-time basis to care for their horses. Survey respondents were asked:

"31.0 Do you employ people, other than family, to care for your horses? ☐YES ☐NO

31.A.1 How many hours per week do you pay non-family members to care for horses?

31.A.2 How many hours per week do family members spend on the care of horses?"

TABLE 2.6: Number of annual person-hours of employment in the care of horses

Total # of owners	**9,655**
% of owners surveyed who employ non-family members	7.4%
Estimated total # of provincial employers	714
Estimated # of horses owned by employers	20,911
# of person-hours / per week / per horse	1.07
Total person-hours per year	**1,163,488**

The care of horses involves a total of 1,163,488 person-hours of paid employment per year for Saskatchewan residents, the equivalent of 582 full-time jobs.

2.1.4.2. Additional Direct Employment:

The provincial horse industry generates additional direct employment through a variety of sources:

- ❖ service providers to the herd (veterinarians, farriers, equine therapists, etc.)
- ❖ service providers to owners, riders & drivers (trainers, coaches, etc.)
- ❖ horse show judges & officials
- ❖ employees of horse clubs/associations
- ❖ employees of facilities dedicated to horse-related activities (racetracks and facilities for horse shows)

In most cases, services are provided to horse owners, riders & drivers by self-employed entrepreneurs, for whom it is difficult to track "person-hours". For the purposes of this report, we have identified, where possible, the number of individuals impacted by these activities. The economic value of these service providers is calculated in **Section 3.2** of this report **(Economic Factors: Annual Expenditures).**

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Veterinarians: As reported by the Saskatchewan Veterinary Medical Association, equine veterinary care in the province involves

- ❖ 168 practitioners (in 105 practices) in mixed/large animal practices which would include some equine component
- ❖ 5 equine specialists in private practice or resident at provincial universities

Farriers: As reported by the Western Canadian Farriers Association, there are 30 practising farriers in the province, with some form of accredited training for farrier services. It is often the case in Canada for farriers to acquire their training through apprenticeship rather than structured accredited programs. Based on the total annual expenditure on farrier services, it is estimated that there are an additional 120 practising farriers in Saskatchewan ... total estimate 150 provincial farriers.

Equine Therapists: Data not available on the number of practicing equine therapists in the province. There is not, as yet, a professional association or organization representing equine therapists to collect or provide relevant statistics.

Coaches / trainers / show judges: It is difficult to establish the number of individuals involved as a composite number. However, most individuals providing coaching, training or judging services are also horse owners. Of those surveyed who provide these services, all owned horses. Those surveyed were asked:

*"**41.0** How many adults (18 and over) live in your household?*

__40.1__ How many adults in the household earn part of their income from horses?

__40.2__ How many adults in the household earn ALL of their income from horses?

***45.0** Do horse-related activities represent 50-% or more of your PERSONAL income?*

***46.0** Do horse-related activities represent 50% or more of your HOUSEHOLD income?"*

It should be noted that the responses to these questions would also trigger positive answers from those survey respondents who generate annual income from the sale of horses, as well as provision of services. The following table indicates provincial estimates for Saskatchewan residents for whom horse-related activities generate 50% or more of their annual income.

TABLE 2.7: Service Providers to the Industry

	Sample Pool from Survey	% of Sample	Provincial Pool	Estimated Prov. Total
Total Number of adults in households surveyed	739	208%	9,655	20,082
Adults earning part of their income from horse-related activities	190	25.71%	9,655	2,482
Adults earning ALL of their income from horse-related activities	45	6.09%	9,655	587
Survey respondents for whom horse activities = 50% or more of personal annual income	42	12.00%	9,655	1,159
Survey respondents for whom horse activities = 50% or more of household annual income	18	5.14%	9,655	496

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Of Saskatchewan horse owners, 2,482 earn part, or all of their income from horse-related activities. Horse activities represent 50% or more of personal income for 1,159 Saskatchewan horse owners, and provide 50% or more of household income for 496 Saskatchewan families.

Employees Horse Clubs & Facilities: In addition to those directly employed in the care of horses, or in providing services to horse owners, Saskatchewan residents are also employed as support staff for provincial horse clubs & associations, and at provincial facilities dedicated to horse-related entertainment events (racetracks, exhibition facilities for horse shows, etc.). In the Club/Association and Agricultural Society questionnaires, survey respondents were asked:

"7.0 Does your club/association/society have any paid office staff?

14.10 Did your association pay for hired staff (excluding office staff & judges) for 2001 shows/events/horse sales"? ... How many hours were paid for hired staff in 2001?"

Data from the 127 associations, agricultural societies, and facilities managers surveyed shows the total hours paid in 2001 to be 656,606 – the equivalent of 328 full time jobs.

Additional direct employment is generated for livestock transportation company employees for the transportation of horses between farms and facilities for the activities in which they are involved. The average annual expenditure for "hauling horses" is included in **Section 3.2.**

2.2. Herd Profile:

During interviews, respondents were asked to define the "primary use" for their horses, through their response to Question 12.0:

"12.0 How many of your horses are MOSTLY used for the following: ... (list of categories)

The resulting responses were used to profile the primary use for horses in the provincial herd:

TABLE 2.8: Horses "Primary Use" ...

Category Use	Sample Response	% of Sample	Estimated Provincial Total
PROVINCIAL TOTALS	**4,375**	**100%**	**95,000**
Racing (thoroughbred, standardbred & speed racing)	23	0.63%	598
Chuck Wagon Racing	21	0.49%	468
Competition (other than racing)	860	23.55%	22,370
Pleasure Riding or Driving	822	22.51%	21,382
Breeding stock	1,014	27.76%	26,376
Riding lessons	56	1.53%	1,457
Commercial trail rides, sleigh rides or tourist activities	53	1.45%	1,379
Work (ranching, logging, farming, etc.)	359	9.83%	9,338
Companionship or full retirement	137	3.75%	3,564
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Data from survey participants shows:

- ❖ 78% of horses owned were foaled in Saskatchewan
- ❖ 75.5% of horses owned are pedigreed stock, registered with a pedigree breed registry. An additional 4.9% of horses owned are pedigree stock, but are not as yet registered. Total herd percentage of pedigree stock is 80%
- ❖ 211 of the 216 commercially active stallions owned are registered with a pedigree breed registry (97% of active stallions). Active stallions bred an average of eight mares each during the 2001 season, for an average stud fee of $583
- ❖ 83% of eligible broodmares owned are registered with a pedigree breed registry. Owners bred 74% of their broodmares for the 2001 season, and expect to breed 76% of mares for 2002. Mare owners purchasing stud services or semen, paid an average $662 fee for 2001
- ❖ The average investment to purchase or breed horses owned by survey participants was approximately $1,130 per horse owned. Owners estimate the "value of your horse today" at an average of $2,805 per horse ... 248% of the purchase price

2.3. Demographic profile ... Owners/Riders/Drivers

The results of the survey interviews reveals the profile of the "typical" Saskatchewan horse owner/rider or driver as:

- ❖ Female (70% of sample)
- ❖ Baby-boom generation ... median age 40 – 49
- ❖ Owns (with her family) an average of 12.98 horses
- ❖ Owns more horses than she (and her family) did in 1996 ... 6 more horses
- ❖ Has owned horses for more than 10 years (80% of sample), and has been riding horses for more than 10 years (84% of sample)
- ❖ Owns or lives on the same property as her horses (80% of sample)
- ❖ Attended college or university (56% of sample)
- ❖ Household annual income $40,000 - $60,000 (median household income)
- ❖ Lives in a household where one other person rides (either one other adult, or one child)
- ❖ Owns a computer (75% of sample), and uses the Internet (66% of sample)
- ❖ Has an E-mail address (60% of sample)
- ❖ Belongs to a horse-related club or association (80% of sample) and probably pays fees to at least two different clubs
- ❖ Donates about 80 hours per year of volunteer time to activities for her club or association

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2.4. Participation profile ... Owners/Riders/Drivers

The total sample of 355 survey participants/respondents was generally representative of the diversity of participation in the horse industry. Survey respondents were asked to define their participation in the industry by eight categories.

"50.0 In which of the following horse-related activities do you participate ... select as many categories as apply:

- *You are a coach, riding instructor or horse trainer*
- *You are a farm manager, stable manager or ranch manager*
- *You are a breeder*
- *You are an industry service provider (veterinarian, farrier, equine dentist, equine therapist, course designer)*
- *You are a pleasure rider or driver*
- *You ride or drive competitively*
- *You are a show organizer, judge or official*
- *You provide products to the horse industry (tack shop owner, feed mill manager, or sell other products)"*

The resulting data:

TABLE 2.9 ... Participation categories for Saskatchewan owners/riders/drivers

Category	Sample	Responses	% of Sample
Coach/trainer/riding instructor	355	116	32.6%
Farm/stable/ranch manager	355	122	34.3%
Breeder	355	130	36.6%
Service provider	355	27	7.6%
Pleasure rider	355	314	88.4%
Competitor	355	176	49.5%
Show organizer/judge/official	355	97	27.3%
Product supplier	355	36	10.1%
TOTALS		1,018	286.4%

The typical owner/rider/driver participates in the horse industry in three different categories. When asked to further define their participation into a single category, the resulting responses were:

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TABLE 2.10 ... Participation Single Category

Category	% of Sample
Coach/trainer/riding instructor	8.1%
Farm/stable/ranch manager	11.8%
Breeder	12.1%
Service provider*	1.97%
Pleasure rider	43.6%
Competitor	16.9%
Show organizer/judge/official	3.6%
Product supplier*	1.4%
TOTALS	**100.0%**

***NOTE:** It should be noted that there are a number of related but dependant industries within the Saskatchewan horse industry which have not been included in this study. The methodology of this study was based on data for horse owners, riders & drivers. As such, there is a significant sector of industry participation that is not reflected in this analysis. For example, saddle-makers, tack manufacturers or distributors, horse feed producers, retail or distribution operations, etc. would not be included in this analysis unless the individual participant was also involved as a rider, driver or owner. Additional research would be required to determine the size and economic impact of these "ancillary" industry participants.

To further define participation roles and activities, those surveyed were asked additional questions as follows:

	% YES RESPONSE
❖ *Do you sell horses?*	*43%*
❖ *Do you provide horse training services?*	*16.6%*
❖ *Do you purchase the services of a horse trainer for your horse(s)?*	*76%*
❖ *Do you provide riding lessons or coaching services?*	*18.6%*
❖ *Do you purchase riding lessons or coaching services?*	*38%*
❖ *Do you compete?*	*53.2%*

2.4.1. Competitors ... Equestrian Sport

Those who compete were asked an additional series of questions to define their participation in competitive equestrian sport. From a defined list of 20 different competitive sport disciplines, respondents were asked to select all disciplines in which they compete, and to select the single discipline in which they MOST often compete.

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In addition, for survey participants in households with other adult competitors, participants were asked to select the discipline in which "other adult competitor" most often competes. For households reporting children in the household who compete, survey participants were asked to select the discipline in which "competing children in household" most often compete.

The compiled results are reported in Table 2.11 below, where the disciplines are ranked from most popular to least popular for adult competitors. Sample response percentages have been applied to the number of adult club members who compete, to estimate the number of individual adult competitors participating in each discipline in 2001.

TABLE 2.11 Adult Competitors by Discipline, Sample & Estimated Provincial Totals

Discipline	Ranking Order for Adult Competitors	% of Sample	Estimated # of adult competitors	Ranking for children competing
Western pleasure	1	23.28%	2,248	2
Team cattle penning	2	17.46%	1,686	4
Dressage	3	14.29%	1,379	14
Barrel Racing / pole bending	4	12.70%	1,226	4
Hunter / jumper	5	10.05%	971	6
Halter / line classes	6	8.47%	817	6
Reining	7	8.47%	817	10
Roping (team roping)	8	6.35%	613	8
Driving	9	6.35%	613	10
Cutting	10	5.29%	511	14
Racing	11	4.23%	409	14
Gymkhana	12	3.70%	358	3
Rodeo	13	2.65%	255	8
Other (not listed)	14	2.65%	255	12
Endurance Riding	15	2.65%	255	12
Saddleseat	16	2.12%	204	14
Chuck wagon racing	17	1.59%	153	14
Eventing	18	< 1%	51	14
Polo	19	< 1%	51	14
Pony Club / 4H	N/A	N/A	N/A	1

Survey participants were also asked how many competitions they entered in 2001, and whether that was more, less or the same number of competitions as the previous show season (2000). They

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were also asked whether they expected to compete in more, less or the same number of competitions next season (2002).

In addition, those surveyed were asked how many competitions "other competing adults" and "competing children" in the household, participated in for the 2001 show season.

TABLE 2.12: Average Number of Competitions

	Avg. # of 2001 Shows	2000 SHOW SEASON ... Adults who competed M/L/S compared to 2000			2002 SHOW SEASON ... Adults who expect to compete in M/L/S in 2002		
		MORE	LESS	SAME #	MORE	LESS	SAME #
Adults interviewed who compete	7.6	24.9%	41.2%	30.1%	52.0%	7.4%	38.6%
Other adults in sample households	9.8						
Competing children in sample households	6.8						

Interviews with executive representatives of 127 clubs & associations included questions regarding horse shows/competitions hosted by the association in 2001. In addition, those surveyed were asked if this represented more, less, or the same number of shows as the previous show season (2000).

TABLE 2.13: Saskatchewan Equestrian Sport Competitions (excluding racing)

	TOTAL	Days Hosted by clubs/associations	Days hosted by Agricultural Societies
2001 equestrian sport competitions	521		
2001 "show days"	638	571	67

		% REPORTING MORE THAN 2000	% REPORTING LESS THAN 2000	% REPORTING SAME # AS 2000
Show days compared to 2000		17%	11%	70%
Show entries compared to 2000		36%	20%	45%
Spectators compared to 2000		20%	14%	62%

2.4.2. Competitors ... Racing Sector

Horse racing in Saskatchewan involves three categories of races: Standardbred racing (in harness), Thoroughbred racing (under saddle), and Quarter Horse racing, also known as speed racing involving short distances under saddle. All horse racing in the province which allows Pari-Mutuel betting is governed by the Saskatchewan Liquor and Gaming Authority.

Saskatchewan has a total of five licensed racing facilities, of which two have been inactive since 1997. Table 2.14 below lists racing days (by race category) for the 1997 through 2001 season. It should be noted that figures for 2001 are not final and will change when tabulated by the Canadian Pari-Mutuel Agency in January 2002.

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TABLE 2.14: Number of Racing Days/Races/Starters Saskatchewan 1997 – 2001

Days/Races/Starters	1997	1998	1999	2000	2001
Standardbred Days	50	51	50	51	31
Thoroughbred Days	50	50	47	42	39
Quarter Horse Days	26	20	5	6	6
Standardbred Races	312	370	377	359	275
Thoroughbred Races	373	376	336	293	313
Quarter Horse Races	30	44	8	23	32
Standardbred Starters*	142	162	128	128	N/A
Thoroughbred Starters*	442	468	428	392	N/A
Quarter Horse Starters*	168	229	56	132	110

***NOTE**: "Starters" represents the number of individual horses that started one or more races during the year.

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- ❖ Total capital investment in horses, farm improvements for horses, horse-related tack & equipment totals $394,000,000+, of which $107,000,000+ is invested in horses
- ❖ Annual direct expenditure for Saskatchewan horses for feed & care, training & showing, and equipment & facilities maintenance totals $40,000,000+
- ❖ More than 1,569,000 acres of provincial farm lands are devoted to hay or grain production to feed horses, generating the equivalent of 1,040+ full time jobs
- ❖ Competitors contribute $2,240,000+ to "in-province" tourism through their show activities

3.0 Economic Factors & Industry Impact ...

The live uses of horses impacts the provincial economy through a variety of channels:

- Capital investment in stock, property improvements & equipment
- Annual expenditures for the care & feeding of horses
- Annual expenditures for replacement tack, equipment & property improvements
- Annual expenditures for training & showing horses
- Employment for Saskatchewan residents
- Land dedicated to pasturage or feed production for horses
- Travel for showing horses within the province
- Wagering for live racing within the province

3.1 Capital Investment

Horse owners have capital investment in their horses, tack & equipment used directly by their horses, farm improvements to manage their herd, and equipment related to their horse activities.

Horse owners surveyed were asked:

"13.0 How much money did you spend to purchase the horses that you currently own? (including outside stud fees for home-bred horses)

20.0 How much money do you have invested in tack for all your horses? (includes tack that actually touches the horse ... brushes, grooming equipment, saddles, harnesses)

21.0 How much money do you have invested in equipment for your horse business? (includes carriages, horse trailers, sulkies, etc.)

29.0 How much money do you have invested in buildings, fencing or facilities for your horses (including barns, run-in sheds, arenas, fencing for horse paddocks, etc)?"

The resulting responses were applied to the total estimated provincial herd, to estimate total provincial capital investment as follows:

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Table 3.1: Capital Investment Saskatchewan Horse Industry

CAPITAL INVESTMENT	AVERAGE VALUE PER HORSE FROM SURVEY	% OF SURVEY SAMPLE	ESTIMATED TOTAL PROVINCIAL VALUE ... 95,000 horses
Capital invested in purchase of horses	$1,130.84	100%	$107,429,691
Capital invested in tack	$565.20	100%	$ 53,693,566
Capital invested in horse-related equipment	$842.67	100%	$80,108,951
Capital invested in farm improvements for horses	$1,759.91	92%	$153,433,858
TOTALS	**$4,298.72**		**$394,666,066**

3.2 Annual Expenditures

Individual horse owners surveyed were asked a variety of questions related to their annual expenditures for the care and activities of their horses. The resulting responses were applied to the total estimated provincial herd, to estimate total annual expenditure as follows:

Table 3.2: Annual Expenditures ... Per Horse or Owner & Estimated Provincial Totals

EXPENSE CATEGORY	AVERAGE VALUE PER HORSE FROM SURVEY	% OF SURVEY SAMPLE	ESTIMATED TOTAL PROVINCIAL VALUE ... 95,000 horses
Annual Expenditure Equipment & Facilities Maintenance			
Replacement tack & equipment	$33.14	100%	$3,148,137
Replacement horse-business equipment	$50.60	100%	$4,806,674
Replacement / maintenance costs for horse-related farm improvements	$62.00	92%	$5,405,736
SUB-TOTAL	**$145.74**		**$13,360,547**
Annual Expenditure Feed & Care of Horses			
Purchase hay & forage feed	$80.69	67%	$5,101,919
Purchase non-forage feed	$55.05	43%	$2,267,620
Purchase health & grooming products	$67.29	92%	$5,885,529
Purchase bedding	$47.35	34%	$1,533,004
Purchase veterinarian services & prescriptions	$60.91	95%	$5,470,345
Purchase equine dentistry (other than from vet)	$24.74	23%	$540,435
Purchase equine therapy services	$14.09	21%	$286,985
Purchase farrier services	$51.92	77%	$3,814,014
SUB-TOTAL	**$402.04**		**$24,899,850**

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Annual Expenditure Training & Showing	AVERAGE VALUE PER OWNER FROM SURVEY	% OF SURVEY SAMPLE	ESTIMATED TOTAL PROVINCIAL VALUE 9,655 adult owners
Horse trainer services	$39.85	26%	$98,633
Riding & coaching lessons	$21.53	37%	$77,896
Hauling horses	$114.39	14%	$158,665
Association memberships fees	$48.36	86%	$399,838
Costs to compete (entry fees & transportation)	$1,287.00	53%	$6,615,524
SUB-TOTAL	**$1,511.14**		**$7,350,557**
TOTAL DIRECT ANNUAL EXPENDITURE	**$1,966.54**		**$45,610,954**

3.3 Land Usage

Individual horse owners surveyed who live on the same property as their horses were asked a variety of questions related to their property, and its land usage for horse pasture and feed production.

"26.0 What is the total number of acres of the farm or property?

27.0 How many acres are used for horse pasture or turnout?

32.0 Do you grow any of the hay used to feed your horses?

32.A.1 How many acres of land do you use to grow hay?

32.A.2.1 How many days a year do you spend hay cropping:

32.A.2.2 How many hours per day

32A.2.3 How many people per day?

32.A.2.4 How many paid non-family members?

32.A.2.5 What percentage of the hay produced is used to feed your horses?

34.0 Do you grow any of the grain or feed crops used to feed your horses?

34.A.1 How many acres of land do you use each year to grow grain or feed crops?

34.A.1.1 How many days a year do you spend on feed cropping?

34.A.1.2 How many hours a day?

34.A.1.3 How many people per day?

34.A.1.4 How many paid non-family members?

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The resulting responses were applied to the total estimated number of provincial farms with horses to describe provincial land usage on "horse farms" as follows:

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Table 3.1: Capital Investment Saskatchewan Horse Industry

CAPITAL INVESTMENT	AVERAGE VALUE PER HORSE FROM SURVEY	% OF SURVEY SAMPLE	ESTIMATED TOTAL PROVINCIAL VALUE ... 95,000 horses
Capital invested in purchase of horses	$1,130.84	100%	$107,429,691
Capital invested in tack	$565.20	100%	$ 53,693,566
Capital invested in horse-related equipment	$842.67	100%	$80,108,951
Capital invested in farm improvements for horses	$1,759.91	92%	$153,433,858
TOTALS	**$4,298.72**		**$394,666,066**

3.2 Annual Expenditures

Individual horse owners surveyed were asked a variety of questions related to their annual expenditures for the care and activities of their horses. The resulting responses were applied to the total estimated provincial herd, to estimate total annual expenditure as follows:

Table 3.2: Annual Expenditures ... Per Horse or Owner & Estimated Provincial Totals

EXPENSE CATEGORY	AVERAGE VALUE PER HORSE FROM SURVEY	% OF SURVEY SAMPLE	ESTIMATED TOTAL PROVINCIAL VALUE ... 95,000 horses
Annual Expenditure Equipment & Facilities Maintenance			
Replacement tack & equipment	$33.14	100%	$3,148,137
Replacement horse-business equipment	$50.60	100%	$4,806,674
Replacement / maintenance costs for horse-related farm improvements	$62.00	92%	$5,405,736
SUB-TOTAL	**$145.74**		**$13,360,547**
Annual Expenditure Feed & Care of Horses			
Purchase hay & forage feed	$80.69	67%	$5,101,919
Purchase non-forage feed	$55.05	43%	$2,267,620
Purchase health & grooming products	$67.29	92%	$5,885,529
Purchase bedding	$47.35	34%	$1,533,004
Purchase veterinarian services & prescriptions	$60.91	95%	$5,470,345
Purchase equine dentistry (other than from vet)	$24.74	23%	$540,435
Purchase equine therapy services	$14.09	21%	$286,985
Purchase farrier services	$51.92	77%	$3,814,014
SUB-TOTAL	**$402.04**		**$24,899,850**

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Table 3.3 Land Usage ... Saskatchewan Farms With Horses

	PROVINCIAL TOTAL	PROVINCIAL TOTAL DEVOTED TO HORSES
Total acreage on Saskatchewan farms with horses	12,990,143	
Total acreage devoted to horse turnout or pasturage		1,829,440
Acres devoted to hay production for horses	980,462	598,082
Acres devoted to grain /feed production for horses	1,154,352	588,720

3.4 Employment

Individual horse owners surveyed who live on the same property as their horses were asked the following questions related to manhours required for hay and feed grain cropping:

"32.A.2.1 How many days a year do you spend hay cropping:

32.A.2.2 How many hours per day

32.A.2.3 How many people per day?

32.A.2.4 How many paid non-family members?

32.A.2.5 What percentage of the hay produced is used to feed your horses?

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34.A.1.5 What percentage of the feed crop is used to feed your horses?"

The resulting responses were applied to the total estimated number of provincial farms with horses to describe direct employment in hay or feed grain cropping on "horse farms" as follows:

TABLE 3.4 Manhours Per Year Hay & Feed Crop Production

	TOTAL MANHOURS PER YEAR	EQUIVALENT FULL-TIME JOBS	HOURS PAID "NON-FAMILY" MEMBERS	EQUIVALENT FULL-TIME JOBS
Hay production on "horse farms"	1,846,418	923	930,595	465
Hay production to feed horses	1,126,315	563	567,663	284
Grain production on horse farms	1,881,839	941	959,738	480
Grain production to feed horses	959,738	480	494,841	247

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As reported in **Chapter 2: Industry Profile** section of this report, additional employment is generated by the horse industry for the care of horses:

(TABLE 2.6: Number of annual person-hours of employment in the care of horses)

Total # of owners	**9,655**
% of owners surveyed who employ non-family members	7.4%
Estimated total # of provincial employers	714
Estimated # of horses owned by employers	20,911
# of person-hours / per week / per horse	1.07
Total person-hours per year	**1,163,488**

The care of horses involves a total of 1,163,488 person-hours of paid employment per year for Saskatchewan residents, the equivalent of 582 full-time jobs.

3.4.1 Additional Direct Employment:

The provincial horse industry generates additional direct employment through a variety of sources:

- ❖ service providers to the herd (veterinarians, farriers, equine therapists, etc.)
- ❖ service providers to owners, riders & drivers (trainers, coaches, etc.)
- ❖ horse show judges & officials
- ❖ employees of horse clubs/associations
- ❖ employees of facilities dedicated to horse-related activities (racetracks and facilities for horse shows)

In most cases, services are provided to horse owners, riders & drivers by self-employed entrepreneurs, for whom it is difficult to track "person-hours". For the purposes of this report, we have identified, where possible, the number of individuals impacted by these activities. The economic value of these service providers is calculated in **Section 3.2** of this report **(Economic Factors: Annual Expenditures).**

Veterinarians: As reported by the Saskatchewan Veterinary Medical Association, equine veterinary care in the province involves

- ❖ 168 practitioners (in 105 practices) in mixed/large animal practices which would include some equine component
- ❖ 5 equine specialists in private practice or resident at provincial universities

Farriers: As reported by the Western Canadian Farriers Association, there are 30 practising farriers in the province, with some form of accredited training for farrier services. It is often

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Equine Therapists: Data not available on the number of practicing equine therapists in the province. There is not, as yet, a professional association or organization representing equine therapists to collect or provide relevant statistics.

Coaches / trainers / show judges: It is difficult to establish the number of individuals involved as a composite number. However, most individuals providing coaching, training or judging services are also horse owners. Of those surveyed who provide these services, all owned horses. Those surveyed were asked:

"41.0 How many adults (18 and over) live in your household?

40.1 How many adults in the household earn part of their income from horses?

40.2 How many adults in the household earn ALL of their income from horses?

45.0 Do horse-related activities represent 50-% or more of your PERSONAL income?

46.0 Do horse-related activities represent 50% or more of your HOUSEHOLD income?"

It should be noted that the responses to these questions would also trigger positive answers from those survey respondents who generate annual income from the sale of horses, as well as provision of services. The following table indicates provincial estimates for Saskatchewan residents for whom horse-related activities generate 50% or more of their annual income.

(TABLE 2.7: Service Providers to the Industry)

	Sample Pool from Survey	% of Sample	Provincial Pool	Estimated Prov. Total
Total Number of adults in households surveyed	739	208%	9,655	20,082
Adults earning part of their income from horse-related activities	190	25.71%	9,655	2,482
Adults earning ALL of their income from horse-related activities	45	6.09%	9,655	587
Survey respondents for whom horse activities = 50% or more of personal annual income	42	12.00%	9,655	1,159
Survey respondents for whom horse activities = 50% or more of household annual income	18	5.14%	9,655	496

Of Saskatchewan horse owners, 2,482 earn part, or all of their income from horse-related activities. Horse activities represent 50% or more of personal income for 1,159 Saskatchewan horse owners, and provide 50% or more of household income for 496 Saskatchewan families.

Employees Horse Clubs & Facilities: In addition to those directly employed in the care of horses, or in providing services to horse owners, Saskatchewan residents are also employed as support staff for provincial horse clubs & associations, and at provincial facilities dedicated to horse-related entertainment events (racetracks, exhibition facilities for horse

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"7.0 Does your club/association/society have any paid office staff?

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Data from the 127 associations, agricultural societies, and facilities managers surveyed shows the total hours paid in 2001 to be 656,606 – the equivalent of 328 full time jobs.

Additional direct employment is generated for livestock transportation company employees for the transportation of horses between farms and facilities for the activities in which they are involved. The average annual expenditure for "hauling horses" is included in **Section 3.2.**

3.5 Other Economic Impact

In addition to the direct contribution as noted above, the horse industry contributes additional value to the provincial economy through:

- Sale of horses for the riding/driving market and red meat sector
- Contribution to "in-province" tourism generated by Saskatchewan competitors
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3.5.1 Sale of Horses:

Individual horse owners surveyed were asked:

"52.0 Do you sell horses?

52.1 In an average year, how many horses do you sell?

52.2 In an average year, how many horses do you sell for the riding or driving market?

52.3 In an average year, how much money do you earn from the sale of horses for riding or driving?

52.4 In an average year how many horses do you sell to the meat market?

52.5 In an average year, how much money do you earn from sale of horses for meat?"

The resulting responses were applied to the total estimated provincial herd size, to estimate number of horses sold in an "average year" in the province, and the estimated total value of horse sales for the province, as follows:

TABLE 3.5: Value of Sale of Horses

	Average # sold per person from survey	# of people from survey who regularly sell horses	% of sample who sell horses	Estimated total number of horses sold each year
Do you sell horses?	8	110	32.64%	25,212

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Do you sell horses?	8	110	32.64%	25,212

	Average value per horse sold from survey	% of sales to each sector	Estimated # of horses sold by sector	Estimated total value for province
Horses sold to riding/driving market	$1,330.00	92.8%	23,403	$31,126,551
Horses sold to red meat market	$535.00	7.17%	1,808	$967,519
TOTAL SALE VALUE				**$32,094,070**

3.5.2 Contribution to In-Province Tourism:

Individuals surveyed who reported that they actively compete with their horses were asked:

"56.2 This year, how many competitions did you enter?

57.1 How many other adults in your household compete?

57.3 How many competitions did other adults in your household enter this year?

58.1 How many children in your household compete?

58.3 How many competitions did children in your household enter this?

70.1 How many nights was an overnight stay in Saskatchewan required this year?

70.2 How many different people did your overnight stays involve? "

Of the total sample pool of adults interviewed, 53% reported that they compete, and competed in an average of 7.6 competitions each during the 2001 season. For 2001 competitors, 67% reported that they required an average of six "overnight stays" during the 2001. In response to question 70.2, those who reported "overnight stays" reported that on average three different people were involved -- an average of eighteen "person nights" per competitor reporting. Applying the reported values to the total provincial pool of adult owners:

Table 3.6 Value of Competitors' In-Province Travel For 2001 Competition Season

Estimated # of adult owners-competitors who required an "overnight stay"	2,500
Average # of overnight stays required	6
Average # of people per overnight stay	3
Total estimated # of "person nights"	44,998
Average value per "person night"	$50.00
Total value of competitors' overnight stays	**$2,249,914**

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3.5.3 Racing Sector Revenues ... Betting Handle

Live racing in the province, contributes between 6% and 8% of the total betting "handle" for racing within the province.

Table 3.7 Wagering Statistics Saskatchewan 1997 to 2001

	1997	1998	1999	2000	2001
Total Saskatchewan Wagers on Racing	$15,663,103	$16,100,494	$15,514,462	$13,906,978	N/A
Total Betting from Live Racing	**$1,360,720**	**$1,419,145**	**$1,069,285**	**$914,162**	**$913,495**
Total betting on standardbred races	$5,155,316	$4,809,014	$4,577,937	$4,268,024	N/A
Total betting live standardbred races	**$306,499**	**$374,788**	**$332,711**	**$303,636**	**$251,883**
Total betting on thoroughbred races	$10,507,787	$11,291,480	$10,936,525	$9,638,954	N/A
Total betting live thoroughbred races	**$1,054,221**	**$1,044,372**	**$736,574**	**$610,526**	**$661,612**
Provincial "takeout" in taxes	**$1,331,363**	**$1,593,948**	**$1,535,931**	**$1,376,790**	**N/A**

Note: In Saskatchewan thoroughbred racing dates may be reallocated to quarter horse racing, therefore, all handle figures for quarter horse racing are included in the thoroughbred totals above.

From total wagering within the province, on both live and simulcast races, a percentage of total wagering revenue is remitted to the provincial government as tax ... the" provincial take out". For the 1998 through 2001 period, the "provincial take out" has been calculated at 9.9% of wagering.

The 2000 racing season generated $1,376,790 in direct provincial government revenue.

3.5.4 Social Impact

Volunteer Labour Hours: The Saskatchewan horse industry and the diversity of activities in which people and horses are involved, relies heavily on the volunteer time contributed by horse owners to organize and facilitate competitions and other activities.

From those surveyed, it was reported that an adult Saskatchewan horse owner who belongs to at least one club or association contributes an average of 80 hours per year to volunteer activities for their club(s), representing 460,000+ hours per year.

Competition Opportunities for Youth: In addition to the economic contribution that equestrian competition in the province provides to local communities, equestrian sport in all disciplines represents a unique competitive opportunity for rural youth. The nature of the sport requires rural training facilities, and as such, lends an edge to farm-based competitors.

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STRATEGIC EQUINE MARKETING

	Average value per horse sold from survey	% of sales to each sector	Estimated # of horses sold by sector	Estimated total value for province
Horses sold to riding/driving market	$1,330.00	92.8%	23,403	$31,126,551
Horses sold to red meat market	$535.00	7.17%	1,808	$967,519
TOTAL SALE VALUE				**$32,094,070**

3.5.2 Contribution to In-Province Tourism:

Individuals surveyed who reported that they actively compete with their horses were asked:

"56.2 This year, how many competitions did you enter?

57.1 How many other adults in your household compete?

57.3 How many competitions did other adults in your household enter this year?

58.1 How many children in your household compete?

58.3 How many competitions did children in your household enter this?

70.1 How many nights was an overnight stay in Saskatchewan required this year?

70.2 How many different people did your overnight stays involve? "

Of the total sample pool of adults interviewed, 53% reported that they compete, and competed in an average of 7.6 competitions each during the 2001 season. For 2001 competitors, 67% reported that they required an average of six "overnight stays" during the 2001. In response to question 70.2, those who reported "overnight stays" reported that on average three different people were involved -- an average of eighteen "person nights" per competitor reporting. Applying the reported values to the total provincial pool of adult owners:

Table 3.6 Value of Competitors' In-Province Travel For 2001 Competition Season

Estimated # of adult owners-competitors who required an "overnight stay"	2,500
Average # of overnight stays required	6
Average # of people per overnight stay	3
Total estimated # of "person nights"	44,998
Average value per "person night"	$50.00
Total value of competitors' overnight stays	**$2,249,914**

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3.5.3 Racing Sector Revenues ... Betting Handle

Live racing in the province, contributes between 6% and 8% of the total betting "handle" for racing within the province.

Table 3.7 Wagering Statistics Saskatchewan 1997 to 2001

	1997	1998	1999	2000	2001
Total Saskatchewan Wagers on Racing	$15,663,103	$16,100,494	$15,514,462	$13,906,978	N/A
Total Betting from Live Racing	**$1,360,720**	**$1,419,145**	**$1,069,285**	**$914,162**	**$913,495**
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- ❖ Associations reported a 5% increase in memberships for the current year, compared to 2000
- ❖ Approximately 12,000 horses have been added to the provincial herd since 1996
- ❖ Growth is expected to continue ... 25% of owners expect to own more horses in 2006, and 52% expect to own the same number as they do today
- ❖ For equestrian sport competitors, 52% expect to enter more competitions in 2002 than 2001
- ❖ Racing sector has contracted in size and activity from a peak in 1998

4.0 GROWTH ... People, Horses & Activities Individuals and club/association representatives surveyed were asked a number of questions to determine trends for industry growth in recent years in the Saskatchewan industry. Those surveyed were asked questions to determine trends for industry growth for people, horses, and the activities in which they are involved.

- **People** ... Trends in association/club membership
- **Horses** ... Trends in herd size, and new participants joining the industry
- **Activities** ... Trends in numbers of "non-owning riders/drivers", participation in club activities, and competitor entries and spectator numbers for equestrian sport competitions.

4.1 People ... Trends in association membership

Representatives of provincial clubs & associations were asked:

"9.0 How many active (or paid) members do you have for 2001?

11.0 Compared to the previous membership year ... are your membership numbers:

HIGHER How much higher? (%)

LOWER How much lower? (%)

THE SAME"

Of club representatives surveyed, 21% of clubs reported increased membership (from 2000 to 2001), 16% reported fewer members than previous year, and 62% reported the same level of membership from the previous year. Data reported indicates a net 5% increase in club/association membership from 2000 to 2001 membership year, as follows:

TABLE 4.1: Clubs reporting membership change 2000 to 2001 membership year

TOTAL SAMPLE CLUBS REPORTING	104	% of clubs reporting	# of members in 2001	# of new members	% increase/ decrease
# of clubs reporting more members	22	21.15%	1,435	248	17.28%
# of clubs reporting less members	17	16.35%	645	(104)	(16.12%)
Clubs reporting same # of members	65	62.50	3,060	0	
Net gain/loss			**3,204**	**144**	**1.0449%**

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4.2 Horses ... Trends in horse ownership

Individuals surveyed were asked:

"7.Do you own MORE horses, LESS horses, or THE SAME NUMBER of horses as you did five years ago (1996)?"

Of individuals interviewed, 40% of horse owners reported owning more horses than they owned in 1996, compared to 26% who owned less horses and 32% of owners who reported owning the same number of horses as they did in 1996.

Of those interviewed, approximately 3% of "today's owners" report that they have owned horses for less than 5 years, and currently own an average of 3.6 horses each. Applying percentages to provincial horse ownership numbers would indicate that 286 Saskatchewan residents have joined the ranks of horse ownership in the past five years, currently owning 1,031 horses.

Of those interviewed belonging to the "5-year-plus" ownership category, 37% of owners reported an increase in their personal herd of 67%, from 1996 levels (i.e. in 2001 they own 167% of 1996 ownership levels). For the same pool ("5-year-plus" ownership category), 26% of owners reported a net decrease in herd size of 42%.

TABLE 4.2: HORSE OWNERSHIP CHANGE ... 1996 TO 2001

OWNERS REPORTING	% of current horse owners	Horses owned in 1996	Horses owned in 2001	% increase / decrease
Owning MORE horses than 5 yrs ago	37%	1,259	2,105	67.20%
Owning LESS horses than 5 yrs ago	26%	1,149	658	(42.73%)
Owning SAME number as 5 yrs ago	36%	1,581	1,581	0%

Since 78% of horses owned were foaled in Saskatchewan, it is logical to assume that owners reducing their herd size, were selling some of their stock to owners increasing their herd size. It is estimated that 12,000 horses have been added to the provincial herd since 1996.

Herd increase is expected to continue in the short term period. Individual horse owners interviewed were asked:

> *"8.0 Five years from now, do you expect to own MORE, LESS or THE SAME number of horses as you do today?"*

Horse owners who reported owning mares of breeding age were asked:

> *"10.A.1 How many mares of breeding age do you own?*
>
> *10.A.4 How many mares were bred in 2001?*
>
> *10.A.6 How many mares do you plan to have bred in 2002?"*

The resulting responses report that 77% of current horse owners expect to own MORE horses, OR the same number of horses in five years time (2006), with only 23% expecting to own less

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Strategic Equine Marketing

horses. Mare owners bred approximately 74% of their mares of breeding age in 2001, and expect to breed 76% of their mares in 2002, an estimated additional 1,057 mares next season.

TABLE 4.3 Expectation to Own in 2006

	Sample Owners Reporting	% of owners	Estimated provincial total
Owners expecting to own MORE horses in 2006s	83	25.38%	
Owners expecting to own LESS horses in 2006s	76	23.24	
Owners expecting to own SAME # of horses in 2006	170	51.99%	
	Sample horses reported	**% of horses**	**Estimated provincial total**
Mares owned by owners surveyed	2,135	51.63%	49,051
# of mares bred in 2001 (including mares in PMU use)	1,579	73.96%	36,277
# of mares expected to be bred for 2002	1,625	76.11	37,334
Projected net increase / decrease for 2002	**46**	**2.16%**	**1,057**

4.3 Activities ... Trends in participation

Trends in levels of participation were calculated based on questions asked to individuals surveyed, and club/associations executives interviewed, to determine increase or decrease in:

- ❖ number of non-owning riders buying services
- ❖ number of competitions entered by competitors
- ❖ number of show days and related entries & spectators
- ❖ number of horses entered in sales held by associations
- ❖ attendance at seminars or clinics held by associations

Horse owners surveyed were asked:

> *"11.0... Do other people, other than yourself, and those in your household, regularly ride or drive your horses in lessons, for competition, or trail rides?"*

Those who reported "yes" were also asked to report how many horses and individual "other people" were involved, and were also asked:

> *"11.3 Is that MORE, LESS, or the SAME number of people as were riding your horses 5 years ago?"*

From resulting responses, it is estimated that approximately 13,000 "other riders" regularly ride horses owned by those surveyed, including 4,600+ adults and 8,200 children. For horse owners providing trail rides and riding lessons, more than 50% reported "MORE people than 5 years ago", with reported percentages as Table 4.4:

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TABLE 4.4: Owners Reporting "Other Riders"

	Sample Owners Reporting	% of owners
Owners reporting more riders than 1996	46	51.69%
Owners reporting less riders than 1996	6	6.74%
Owners reporting same number of riders as 1996	32	35.96%

Individual surveyed who reported that they were involved in competition were asked:

"56.2 This year, how many competitions did you enter?

56.4 Did you compete in MORE, LESS or the SAME NUMBER of competitions this year as you did last year?

56.5 Next year, do you expect to compete in MORE, LESS or the SAME NUMBER of competitions as you did this year?"

The resulting data shows that 53% of those surveyed were active competitors in 2001, competing in a total of 1,410 competitions, (an average of 7.46 competitions per competitor).

TABLE 4.5: Competition Activity Change ... 2000 - 2002

COMPETITORS REPORTING	MORE THAN 2000	LESS THAN 2000	SAME AS 2000
Number of competitions entered in 2001	24.87%	41.27%	30.16%
COMPETITORS REPORTING	**MORE IN 2002**	**LESS IN 2002**	**SAME IN 2002**
Expectation for competitions to be entered in 2002	52.38%	7.41%	38.62

Representatives from clubs/associations interviewed were asked to define the number and type of activities which their association hosts each year, including, competitions, horse sales, seminars and clinics or workshops involving horses. They were also asked to report increase or decrease in attendance at hosted events for 2001 compared with 2000.

TABLE 4.6: Association Activity Change ... 2000 - 2001

Associations reporting	MORE THAN 2000	LESS THAN 2000	SAME AS 2000
Number of shows in 2001	16.92%	10.77%	70.77%
Number of show entries in 2001	35.38%	20.00%	44.62%
Number of show spectators in 2001	20.00%	13.85%	61.54%
Number of horses in horse sales	16.67%	0.0	83.33%
Seminar attendance	27.27%	0.0	40.91
Clinic/Workshop attendance	24.07%	12.96%	57.11%

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It is clear that horse ownership, and participation by "non-owning riders/drivers" has increased across the province during the 1996 - 2001 period. Participation by club/association members, and competitors in general has increased during the 2000-2001 period, and there is reasonable expectation for continued short-term growth, during the next 12 - 24 months. Those currently participating in the Saskatchewan horse industry appear to be fairly optimistic about increased horse ownership, and increased competition activity during 2002.

The exception to reported growth in participation and competition activities is the Saskatchewan racing sector, which has exhibited a trend for decreasing participation during the 1998 through 2001 period.

TABLE 4.7: Racing Sector Activity 1997 through 2001

	1997	1998	1999	2000	2001
Number of Race Days	126	121	102	99	76
Number of Races	715	790	721	675	609
Number of horses starting in 1 or more races	752	854	612	652	N/A
Total betting handle on live races	$1,360,720	$1,419,145	$1,069,285	$914,162	$913,495
Total purses for live races	$955,760	$1,629,283	$1,537,500	$1,406,449	$1,343,210

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COMPETITORS REPORTING	**MORE IN 2002**	**LESS IN 2002**	**SAME IN 2002**
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It is clear that horse ownership, and participation by "non-owning riders/drivers" has increased across the province during the 1996 - 2001 period. Participation by club/association members, and competitors in general has increased during the 2000-2001 period, and there is reasonable expectation for continued short-term growth, during the next 12 - 24 months. Those currently participating in the Saskatchewan horse industry appear to be fairly optimistic about increased horse ownership, and increased competition activity during 2002.

The exception to reported growth in participation and competition activities is the Saskatchewan racing sector, which has exhibited a trend for decreasing participation during the 1998 through 2001 period.

TABLE 4.7: Racing Sector Activity 1997 through 2001

	1997	1998	1999	2000	2001
Number of Race Days	126	121	102	99	76
Number of Races	715	790	721	675	609
Number of horses starting in 1 or more races	752	854	612	652	N/A
Total betting handle on live races	$1,360,720	$1,419,145	$1,069,285	$914,162	$913,495
Total purses for live races	$955,760	$1,629,283	$1,537,500	$1,406,449	$1,343,210

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5.0 SUMMARY -- GENERAL INDUSTRY PROFILE

The primary objectives of this study were to ascertain the size and scope of the Saskatchewan horse industry; to determine the industry's economic impact within the province; and to identify areas of growth or decline within the industry that could indicate trends.

Research data was gathered, compiled and analyzed during a three-month period (September through November, 2001). Interviews were conducted with 105 industry executives and leaders, as well as 355 individual adult participants in the Saskatchewan horse industry.

The eight geographic regions recognized by Saskatchewan Agriculture & Food, and Saskatchewan Sport were proportionately represented by the sample pool of those interviewed. Information gathered from the interviews was augmented by Statistics Canada data, published statistics from breed registries, Canadian Livestock Registry data, and data from the 1998 Canadian Horse Industry Study. Data calculation for this study has allowed for a margin of error of 2.3%, resulting in an estimated accuracy of 97.5%.

5.1 The People Involved...

The *visible* sector of the industry, typically horse owners who belong to clubs and associations, is also responsible for the involvement of a large *invisible* sector – those who regularly ride horses owned by other people (i.e. horses owned by the visible sector). The study estimates that there are 12,000+ *visible* Saskatchewan horse industry participants who own horses, including 9,655 adult owners and 2,345 junior owners. Additionally, it is estimated that approximately 12,800 *invisible* non-horse-owning, non-club-member industry participants ride or drive horses in Saskatchewan each year.

This study focused on compiling a demographic profile, participation profile and economic impact estimate of the *visible* sector only.

Demographic profiling from the study shows the typical Saskatchewan horse owner to be female (70 percent of sample), 40 to 49 years-of-age, with an annual household income of $40,000 to $60,000. She is likely to have attended college or university (56 percent of sample), owns a computer (75% of sample) and uses the Internet (66% of sample). She owns (with her family) an average of 8.67 horses and resides on the same property where the horses are kept.

Profiling data reveals a well-established, dedicated and active visible sector. The average Saskatchewan owner has owned horses for more than ten years and has been riding or driving horses for more than ten years. She also pays fees for membership in at least two different clubs or associations and donates 80 hours per year of volunteer time to activities for her club or association.

The typical visible participant shows diverse involvement within the industry. Most described themselves as active in three different categories of participation, from the possible eight choices offered (see Table 2.9). The most commonly shared participation category was that of Pleasure Riding, with 88.4% shared participation. Approximately 50% are also active Competitors, while approximately one-third report that they also participate as either a Coach/Trainer/Instructor, Farm/Stable/Ranch Manager, or Breeder. When asked to define their participation by a single category, similar ratios were reported (see Table 2.10).

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Among those adults who describe themselves as 'Competitors', Western Pleasure was the most popular competitive discipline, with 23% participation. Among children, Western Pleasure was second only to Pony Club/4H competition (see Table 2.11).

Data collected from competing participants reveals a thriving competition circuit within the province that includes an impressively large variety of equine sport disciplines. Approximately 9,000 competitors participate annually in the nineteen most popular competitive disciplines listed in Table 2.11, and most of those competitors compete in more than one discipline. In 2001, Saskatchewan adult competitors participated in an average of 7.6 competitions each, and 50 percent of competing adults reported that they expect to compete more often in 2002 (see Table 2.12).

5.2 The Horses Involved...

The size of the Saskatchewan equine herd was estimated by two methods, "Club Calculation Method" and "Census Farm Calculation Method" (see Table 2.4). The resulting data shows that the Saskatchewan equine herd numbers approximately 95,000.

Data shows that 78% of the horses in Saskatchewan were foaled in the province and that 75% of horses owned are pedigreed bloodstock. It is also shown that 83 percent of eligible broodmares and 97 percent of active stallions are pedigreed bloodstock.

The average investment to purchase or breed horses was approximately $1,130 per horse. Owners estimate the value of their horses today to be, on average, 248 percent of the initial investment, that estimated average "current market value per horse" is $2,805. Horse owners who reported selling horses this year (2001), reported an average sales value of $1,330 per horse for horses sold into the "riding/driving" market, only 18% more than the average capital investment per horse.

Data collected to determine the primary use of horses in Saskatchewan is shown in Table 2.8. The top three categories of use were 'Breeding Stock', involving approximately 28% of the herd, 'Competition', involving 24% of the herd, and 'Pleasure Riding or Driving', involving 23% of the herd. Mares involved in Pregnant Mare Urine operations accounted for only 8% of the provincial herd, or 7,600 horses.

While growth in herd size is evident during 1996 through 2001, patterns for horse ownership have been fairly volatile during the period. Of those who belong to the "5-year-plus" ownership group, 37% of owners reported an increase in their herd size of 67%, while 37% reported a net decrease of 43% of their herd size.

It is expected that overall growth in herd size has been impacted by increased activity in the PMU sector during the past five years. Of those interviewed involved in PMU production, 54% of owners reported a net herd increase of 26% (current ownership is 126% of 1996 levels), while none of the owners interviewed in the PMU sector reported a decrease in herd size.

Herd increase is expected to continue over the short-term period, with 77 percent of current owners reporting that they expect to own more or the same number of horses five years from now, and just 23 percent expecting to own fewer. Owners of broodmares, expect to breed 2% more mares next year (2002) compared to 2001 production.

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5.3 Economic Factors and Industry Impact

Of Saskatchewan horse owners, 2,482 earn part or all of their income from horse-related activities. Horse-related activities represent 50% or more of total annual income for 1,159 Saskatchewan horse owners, and provide 50 percent or more of household income for 496 Saskatchewan horse-owning families.

Although horse ownership and the related care of horses is primarily the responsibility of the owner (and family members), 7.4% of horse owners (those who own 23.4% of the horses) employ non-family members on a part-time or full-time basis to care for their horses.

Direct employment in the care of horses, providing services to horse owners or at horse-related facilities totals 1,163,488 hours of paid employment per year – the equivalent of 582 full-time jobs (this includes the services of 173 provincial veterinarians and approximately 150 farriers).

Additional direct employment includes those employed by equine associations, agricultural societies and horse show facilities, who accounted for 656,606 hours of paid employment in 2001 – the equivalent of 328 fulltime jobs.

As mentioned at the beginning of the summary, this study focused on the *visible* sector of the horse industry. Data collected from this group showed a total capital investment in stock, property improvements and equipment equal to $394,666,066, while annual expenditures for the care and activities of horses totaled $40,637,517, a significant contribution to the provincial economy. Additionally, the approximately one-third of the visible sector who sell horses generates $32,094,070 in sale revenues annually.

Unlike other livestock groups, it is important to realize that activities with horses drive value and economic contribution. Study results indicate an average "capital investment" per horse of $1,130, but an annual "maintenance" cost of approximately $300 per animal (excluding replacement costs for business equipment and horse-related property improvements). This "maintenance cost" to the owner represents sales revenue to Saskatchewan suppliers for the required products & services. If the horse is involved in the competitive sector of the industry, either equestrian sport or racing, the economic contribution is significantly higher.

For horses in the racing sector, the average annual maintenance cost for feeding and care is approximately $800 per horse, with an additional average $765 per year per horse in training fees. Race horse owners across the province spend an additional $580 per person per year on "costs to compete" (entry fees, horse nomination fees, association membership fees, etc.). Each race horse in competition in the province contributes $1,570 per year to the local economy in "maintenance cost", and an additional $580 per owner for the "costs to compete".

The racing sector also generates $1.35+ million per year in direct tax revenues to provincial government through "take out" on provincial wagering on races. Provincial take out has averaged $1.46 million for the 1997 through 2000 racing seasons.

For those involved in equestrian sport competition, the average annual maintenance cost is approximately $350 per horse. In addition, each competitor spends an average of $1,460 per year on training and showing costs, and contributes an additional $450 per year to "in-province tourism" through expenditures related to in-province travel to horse shows.

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The methodology of this study was based on the collection and analysis of data for horse owners, riders & drivers -- the *visible* sector of the industry. However, it should be noted that there is a significant segment of industry participation that is not captured by this research method. For example, saddle-makers, tack manufacturers or distributors, horse feed producers, retail or distribution operations, etc. would not be included in this analysis unless the individual participant was directly involved as a rider, driver or owner. Additional research would be required to determine the size and economic impact of these "ancillary" industry groups.

2.4 IMPLICATIONS:

The Saskatchewan horse industry has experienced healthy growth over the past three-to-five year period, as indicated by an increase in herd size and increase in participation in competition and association membership. Owners, riders and drivers presented an air of general optimism that growth would continue in the short term. Mare owners expect to breed more mares in 2002 than they did during the 2001 season, and competitors expect to enter more competitions in 2002 than in 2001.

2.4.1 Equestrian Sport Competition

While the typical competitor appears to be very active and optimistic that she will become more active, there are limiting factors to the growth of the competitive sector. Riders and drivers involved in racing or equestrian sport generally fall into three categories:

- ❖ Those who are involved in the business of selling horses (either young stock or trained horses), who use competitive success to increase the market value of their breeding stock and their progeny
- ❖ Those who expect the potential return from competition (through prize money, purses, or increased value of stock) to be sufficient to support the cost of their competitive activities, and
- ❖ Those who are able to finance their horse ownership and competitive activities totally through discretionary income from other income sources.

Based on the data acquired through this study, the average annual cost-per-horse for feed & care of horses involved in competition is $346 (excluding annual replacement costs for business equipment or property improvements). In addition, a Saskatchewan competitor spends an average of $172 per competition.

In the optimal economic model for the horse industry, success in racing or equestrian competition would increase the market value of breeding stock and their progeny. In the recreation and tourist sectors, increased demand for "non-owning rider" opportunities would impact the market value for riding horses

It is clear from the data analysis, that the increase in competition and "non-owning riding" activity has not generated a related increase in value of stock. Owners interviewed estimate that the current market value of their horses was approximately 248% of their original purchase price, an estimate that represents an average value of $2,805 per horse. This estimated market value is not being realized in actual sales. The average sale price for horses sold in the province in 2001 (to the riding/driving market) was $1,330 per horse.

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It would appear that those involved in equestrian competition (and racing) expecting to increase their competition activity in 2002 would fall into the second or third category -- expecting the potential return to support the cost of competition, or able to finance their sport activities through discretionary income.

Expectations for increased competitive activity and related economic impact will only be realized if the following factors (or a combination of these factors) occur:

- ❖ The provincial economy remains strong, and those who wish to be involved in horse ownership and competition have sufficient disposable discretionary income to support their activities, or
- ❖ Significant increases in purse/prize moneys are injected into provincial competitions sufficient to cover the costs of increased competition, or
- ❖ Sufficient "new participants" are attracted into the competitive sector of the industry to generate "new competition" value.

It would appear prudent for industry stakeholders to develop a strategic marketing plan to attract new participants into the industry on an on-going basis. The author would suggest that the industry examine the factors and programs required to turn those involved in the "invisible" sector (non-owning riders or drivers), into active horse-owning competitors in the province.

2.4.2 Provincial Racing Sector

One area of the provincial competition sector that has shown significant decline is the racing sector.

The health of a provincial racing sector is driven by purse values. Purse values are determined by wagering values and provincial taxes levied on wagering. Wagering values are determined by 'return' to the bettor (with provincial take out factored in) and the amount and quality of product available on which to bet. The quality and amount of racing product available is determined by the breeders. There is a cycle of dependency among these factors in order for racing to thrive.

In Saskatchewan, purse values are among the lowest in Canada. This is due to several factors:

- ❖ the provincial take on wagering is 9.9% - the highest among provinces with significant live racing sectors (Ontario provincial takeout is set at 0.5% for example). Due to the high takeout, intelligent gamblers choose other gaming options with higher return on wager
- ❖ There is a lack of secondary wagering revenue (on-site slot machines, for example)
- ❖ Low purses bring down the value of breeding stock and significantly reduce the value of each breeder's foal crop.

When costs to breed become greater than the sale revenues from horses bred to race, the market begins to shrink – as it has in Saskatchewan.

In the current Saskatchewan environment, the costs to produce a racehorse to the track as a two-year-old are a minimum of $1,940 per horse. The annual cost-to-campaign that horse (including feed, care and training fees) average $1,569 per horse.

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Strategic Equine Marketing

When total purses for live racing the province ($1,406,449 for 2000 racing season) are divided by the number of horses starting in one-or-more races (652 in 2000), the average purse-per-horse is $2,157 -- insufficient return to cover the cost of production. This leads to fewer race days, with fewer starters each year … i.e. less live racing product available in the province on which wagering can occur. As quality and quantity of live product decreases, purses and wagering further decline.

While the entire Canadian racing industry suffered a decline through the latter 1990's, some provinces have managed to turn their industries around and are now showing significant expansion. It would appear that this has not been the case in Saskatchewan, and that the provincial racing industry is in a downward spiral that will require aggressive measures to correct.

Given the nature of horse racing, this sector of the industry has the potential to employ more people-per-horse than any other equine sector. Each race horse in active competition requires the care of a trainer, a groom, a stablehand, and a rider or driver in addition to the employment potential of the breeding facility that produced the horse. Considering the employment impact and the potential revenues to the province generated by racing (direct tax revenue on wagering, value to the economy of the breeding sector and all of its dependent industries, etc), the author would suggest that regenerating an active racing sector in the province would be a worthwhile investment.

2.4.3 Provincial Breeders

Current owners paid an average $1,130 per horse to purchase their horses. When compared to data acquired during the 1998 Canadian Horse Industry Study, the average capital investment per horse in Saskatchewan in 1998 was $1,360 per horse. In actuality the average value per horse has gone down in the province in the past three years.

The average cost-of-production to a Saskatchewan breeder is approximately $1,600 for a yearling (including capital invested in the mare, stallion/stud service costs, feed and care for mare and yearling). The average cost-of-production for a two-year-old would be $1,800. The average sale price per horse is lower than the cost-of-production to the breeder.

The logical assumption is that there is a significant oversupply of horses in the province relative to what the domestic provincial market can absorb, bringing the real value down. A determined plan to increase provincial exports would help to increase real value while injecting 'outside' dollars into the industry.

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Strategic Equine Marketing

ALL RESPONDENTS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 355

Respondents per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	355	58	16.34%
Region 2	355	30	8.45%
Region 3	355	57	16.06%
Region 4	355	27	7.61%
Region 5	355	53	14.93%
Region 6	355	23	6.48%
Region 7	355	61	17.18%
Region 8	355	46	12.96%

Gender	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Female	355	248	69.86%
Male	355	107	30.14%

Age Group:	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
18 to 19	355	4	1.13%	
20 to 29	355	28	7.89%	
30 to 39	355	59	16.62%	
40 to 49	**355**	**130**	**36.62%**	**MEDIAN**
50 to 59	355	78	21.97%	
Over 60	355	52	14.65%	

Attended College or University	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	355	198	55.77%
NO	355	157	44.23%

Annual Household Income	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
Less than $40,000 per year	309	89	28.80%	
$40,000 to $60,000 per year	**309**	**92**	**29.77%**	**MEDIAN**
$60,000 to $80,000 per year	309	52	16.83%	
$80,000 to $100,000 per year	309	30	9.71%	
Over $100,000 per year	309	46	14.89%	

% of Annual Income from Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
>50% of personal annual income	355	42	11.83%
>50% of household annual income	355	18	5.07%

How long riding/driving horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't ride or drive	355	13	3.66%
Less than 5 years	355	8	2.25%
Five to 10 years	355	33	9.30%
More than 10 years	355	299	84.23%

Adults in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	355	355	100.00%	739
Adults in household who ride ...				541
Average # of adults per household who ride				1.52

Children in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	355	169	47.61%	269
Children in household who ride ...				177
Average # of children per household who ride ...				1.05

Member of Club or Association	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	355	306	86.20%	730
Average # of clubs per member				2.39
Volunteer hours per year on club activities				24,707
Average # of volunteer hours per member				80.74

Live on same property as horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	337	270	80.12%	
Total acreage all properties				197,246
Average # of acres per property				731
Average # of acres per horse				45

Employ people to care for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	270	20	7.41%	963
# of non-family full-time employees				24.08
Average # non-family employees per employer				1.20

See need for standardized staff training	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	20	16	80.00%

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY

PEOPLE PROFILE

Total sample size: 355

Use the Internet	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	355	234	65.92%
Non users who expect to use in next year	121	42	34.71%
Have E-mail	234	214	91.45%

Own computers	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	355	266	74.93%
Expect to purchase within 1 year	89	16	17.98%

Carry liability insurance for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	355	170	47.89%

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	355	337	94.93%	4375
Non-owners, expect to own in 5 yrs	18	6	33.33%	
Average # of horses owned				12.98

Own horses through syndicate	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	337	24	7.12%	37.00
Average "equivalent horses" owned				1.54

How long owned horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't own horses	355	18	5.07%
Less than 5 years	337	10	2.97%
Five to 10 years	337	57	16.91%
More than 10 years	337	269	79.82%

Own more/less horses than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
MORE	337	135	40.06%	879
LESS	337	90	26.71%	491
THE SAME #	337	115	34.12%	
Net increase/decrease in herd size			8.87%	388

Care for other peoples' horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	355	85	23.94%	878
Average # of other peoples' horses cared for				10

Horses expected to own in 5 yrs	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	337	79	23.44%
LESS	337	76	22.55%
THE SAME #	337	178	52.82%
Non-owners who expect to own	18	6	33.33%

Other people ride their horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	337	89	26.41%	
# of horses ridden by other people	4375	256	5.85%	
# of people riding				853
# of adults				341
# of children				512
Average # of riders per year per horse in use				3.3

More or less people than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	89	46	51.69%
LESS	89	6	6.74%
THE SAME #	89	32	35.96%

Sell Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	337	153	45.40%	1213
Horses sold to riding/driving market	1213	1126	92.83%	
Horses sold to meat market	1213	59	4.86%	

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Investment to purchase	4375	$4,947,420	$1,130.84

Capital invested tack & equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Tack & harness	4375	$2,472,730	$565.20

Capital invested horse equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse business equipment	4375	$3,686,700	$842.67

Capital invested horse farm improvmts	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse-related farm improvements	4375	$7,699,600	$1,759.91

ALL RESPONDENTS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 355

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	355	337	94.93%	4375
Non-owners, expect to own in 5 yrs	18	6	33.33%	
Average # of horses owned				12.98

Horses owned per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	4375	1895	43.31%
Region 2	4375	80	1.83%
Region 3	4375	533	12.18%
Region 4	4375	237	5.42%
Region 5	4375	607	13.87%
Region 6	4375	132	3.02%
Region 7	4375	537	12.27%
Region 8	4375	354	8.09%

Horses foaled in Saskatchewan ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	4375	3406	77.85%

Horses of registered stock	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	4375	3305	75.54%

Horses of pedigree not yet registered	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	1070	79	7.38%

Herd Profile ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MANY
Mares of breeding age	4375	2135	48.80%	
Mares bred this season	2135	1579	73.96%	
Mares expected to be bred next yr.	2135	1625	76.11%	
Stallions at stud	4375	216	4.94%	
Mares serviced in 2001	216	1757		
Average # of mares per stallion	216	8.13		
Stallions providing outside stud services	216	52	24.07%	
Revenue from stud services	52			$125,850.00
Average revenue per stallion				$2,420.19
Average stud fee per mare				$582.64

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	
Investment to purchase	4375	$4,947,420	
Estimated current market value	4375	$12,273,192	
Average capital investment / horse	$1,130.84	Average mkt. value per horse	$2,805.30

PRIMARY USE ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
Racing (thor'bred, standardbred & speed)	4375	23	0.53%
Chuck wagon racing	4375	21	0.48%
Competition (other than racing)	4375	860	19.66%
Pleasure Riding or Driving	4375	822	18.79%
Breeding Stock	4375	1014	23.18%
Riding lessons	4375	56	1.28%
Commercial trail, sleigh rides / tourists	4375	53	1.21%
Work (ranching, logging, farming, etc.)	4375	359	8.21%
Companionship or full retirement	4375	137	3.13%
PMU production (pregnant mare urine)	4375	1015	23.20%
Meat production	4375	3	0.07%
Other	4375	12	0.27%

NOTE: The number of horses in PMU production distorts % ratios. Refer to Profile Pg. 9

Annual expenditure forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	337	159	47.18%	$353,000
p.a. avg. expenditure for each horse for which product/service was purchased				$80.69

Annual exp. non-forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	337	170	50.45%	$103,560
p.a. avg. expenditure for each horse for which product/service was purchased				$55.05

Annual exp. health & grooming	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	337	320	94.96%	$271,059
p.a. avg. expenditure for each horse for which product/service was purchased				$67.34

Annual exp. bedding	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	337	119	35.31%	$70,430
per annum average expenditure for each horse purchased for				$47.35

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 355

Annual exp. vet & prescriptions	MAX. SAMPLE	TOTAL REPORTED	% OF SAMPLE	HOW MUCH
	337	324	96.14%	$253,171
p.a. avg. expenditure for each horse for which product/service was purchased				$57.87

Annual exp. equine dentistry	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	337	54	16.02%	$24,886
p.a. avg. expenditure for each horse for which product/service was purchased				$24.73

Annual exp. equine therapy	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	337	91	27.00%	$13,220
p.a. avg. expenditure for each horse for which product/service was purchased				$14.39
% of therapy users who have used equine chiropractic				50.55%
% of therapy users who have used equine massage				45.05%
% of therapy users who have used equine accupuncture				6.59%
% of therapy users who have used other therapies				1.10%

Annual exp. farrier services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	337	254	75.37%	$176,429
p.a. avg. expenditure for each horse for which product/service was purchased				$52.37

Annual exp. replacement tack	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	337	316	93.77%	$144,980
p.a. avg. expenditure for each horse for which product/service was purchased				$33.14

Annual exp. replacement equipment	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	337	245	72.70%	$221,360
p.a. avg. expenditure for each horse for which product/service was purchased				$50.60

Annual exp. farm improvement	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	270	228	84.44%	$271,270
p.a. avg. expenditure for each horse for which product/service was purchased				$62.00

Annual exp. boarding services	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MUCH
Owners who pay boarding fees	337	65	19.29%	
Number of horses boarded/mthly fee	4375	120	2.74%	$17,429
Average monthly fee per boarded horse				$145.24

ALL RESPONDENTS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 355

Participation Categories	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	355	116	32.68%
farm, stable or ranch manager	355	122	34.37%
breeder	355	130	36.62%
service provider	355	27	7.61%
pleasure rider	355	314	88.45%
competitor	355	176	49.58%
show organizer, judge, official	355	97	27.32%
product or service supplier	355	36	10.14%
TOTALS	355	1018	286.76%

Primary Participation Category	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	355	29	8.17%
farm, stable or ranch manager	355	42	11.83%
breeder	355	43	12.11%
service provider	355	7	1.97%
pleasure rider	355	155	43.66%
competitor	355	61	17.18%
show organizer, judge, official	355	13	3.66%
product or service supplier	355	5	1.41%
TOTALS	355	355	100.00%

Offer coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from coaching services	355	66	18.59%	$125,080
			# of clients	787
			Avg. annual income from coaching services	$1,895

Offer horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from horse training services	355	59	16.62%	$174,355
			Avg. annual income from horse training services	$2,955

Pay to haul horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	337	50	14.84%	$38,550
			Average annual expenditure for each horse hauled	$114

Purchase coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	355	133	37.46%	$94,215
			Average per annum expenditure per coaching student	$725

Purchase horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	355	91	25.63%	$174,355
			Average per annum expenditure per training services client	$2,004

Competitor	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	355	189	53.24%

Competitions entered in 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	189	186	98.41%	1,410
			Average # of competitions per competitor	7.58

Sport / competition disciplines	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Western Pleasure	189	64	33.86%
Team Cattle Penning	189	37	19.58%
Dressage	189	35	18.52%
Barrel Racing / Pole Bending	189	33	17.46%
Hunter / Jumper	189	30	15.87%
Halter/ Line Classes	189	30	15.87%
Reining	189	23	12.17%
Roping (including team roping)	189	17	8.99%
Driving	189	18	9.52%
Cutting	189	7	3.70%
Racing	189	6	3.17%
Gymkhana	189	14	7.41%
Rodeo	189	11	5.82%
Other (not listed)	189	17	8.99%
Endurance Riding	189	8	4.23%
Saddleseat	189	5	2.65%
Chuck wagon racing	189	1	0.53%
Eventing	189	0	0.00%
Polo	189	0	0.00%
TOTALS		356	188.36%

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 355

Entered More or less shows than 2000	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	189	47	24.87%
LESS	189	78	41.27%
THE SAME #	189	57	30.16%

Expect to enter in 2002 compared 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	189	99	52.38%
LESS	189	14	7.41%
THE SAME #	189	73	38.62%

Cost to compete 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	189	145	76.72%	$243,372
			Average cost per competitor	$1,678
			Average cost per show	$173

Regularly ride on public lands	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	355	120	33.80%

Would ride on public lands if avail.	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	235	137	58.30%

Volunteer hours on club activities	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	355	288	81.13%	24,707
			Average hours per volunteer	85.79

Wishes to participate in focus group	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	355	289	81.41%

REGION 1

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 58

Respondents per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	355	58	16.34%
Region 2	355	30	8.45%
Region 3	355	57	16.06%
Region 4	355	27	7.61%
Region 5	355	53	14.93%
Region 6	355	23	6.48%
Region 7	355	61	17.18%
Region 8	355	46	12.96%

Gender	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Female	58	45	77.59%
Male	58	13	22.41%

Age Group:	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
18 to 19	58	0	0.00%	
20 to 29	58	2	3.45%	
30 to 39	58	8	13.79%	
40 to 49	**58**	**22**	**37.93%**	**MEDIAN**
50 to 59	58	14	24.14%	
Over 60	58	11	18.97%	

Attended College or University	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	58	24	41.38%
NO	58	34	58.62%

Annual Household Income	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
Less than $40,000 per year	58	16	27.59%	
$40,000 to $60,000 per year	**58**	**11**	**18.97%**	**MEDIAN**
$60,000 to $80,000 per year	58	7	12.07%	
$80,000 to $100,000 per year	58	4	6.90%	
Over $100,000 per year	58	12	20.69%	

% of Annual Income from Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
>50% of personal annual income	58	21	36.21%
>50% of household annual income	58	13	22.41%

How long riding/driving horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't ride or drive	58	2	3.45%
Less than 5 years	58	1	1.72%
Five to 10 years	58	4	6.90%
More than 10 years	58	51	87.93%

Adults in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	58	58	100.00%	120
Adults in household who ride ...				87
Average # of adults per household who ride				1.50

Children in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	58	42	72.41%	42
Children in household who ride ...				30
Average # of children per household who ride ...				0.71

Member of Club or Association	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	58	53	91.38%	155
Average # of clubs per member				2.92
Volunteer hours per year on club activities				3,902
Average # of volunteer hours per member				73.61

Live on same property as horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	58	51	87.93%	
Total acreage all properties				37,912
Average # of acres per property				743
Average # of acres per horse				20

Employ people to care for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	51	7	13.73%	564
# of non-family full-time employees				14.10
Average # non-family employees per employer				2.01

See need for standardized staff training	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	7	4	57.14%

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 58

Use the Internet	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	58	32	55.17%
Non users who expect to use in next year	26	10	38.46%
Have E-mail	32	29	90.63%

Own computers	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	58	43	74.14%
Expect to purchase within 1 year	15	2	13.33%

Carry liability insurance for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	58	35	60.34%

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	58	58	100.00%	1895
Non-owners, expect to own in 5 yrs	0	0	0.00%	
Average # of horses owned				32.67

Own horses through syndicate	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	58	6	10.34%	8.00
Average "equivalent horses" owned				1.33

How long owned horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't own horses	58	0	0.00%
Less than 5 years	58	2	3.45%
Five to 10 years	58	9	15.52%
More than 10 years	58	47	81.03%

Own more/less horses than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
MORE	58	24	41.38%	259
LESS	58	13	22.41%	105
THE SAME #	58	21	36.21%	
Net increase/decrease in herd size			8.13%	154

Care for other peoples' horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	58	17	29.31%	413
Average # of other peoples' horses cared for				24

Horses expected to own in 5 yrs	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	58	10	17.24%
LESS	58	13	22.41%
THE SAME #	58	35	60.34%
Non-owners who expect to own	0	0	0.00%

Other people ride their horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	58	10	17.24%	
# of horses ridden by other people	1895	32	1.69%	
# of people riding				127
# of adults				51
# of children				76
Average # of riders per year per horse in use				4.0

More or less people than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	10	5	50.00%
LESS	10	1	10.00%
THE SAME #	10	4	40.00%

Sell Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	58	33	56.90%	795
Horses sold to riding/driving market	795	757	95.22%	
Horses sold to meat market	795	44	5.53%	

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Investment to purchase	1895	$2,155,025	$1,137.22

Capital invested tack & equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Tack & harness	1895	$468,600	$247.28

Capital invested horse equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse business equipment	1895	$1,013,000	$534.56

Capital invested horse farm improvmts	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse-related farm improvements	1895	$3,453,500	$1,822.43

REGION 1

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 58

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	58	58	100.00%	1895
Non-owners, expect to own in 5 yrs	0	0	0.00%	
Average # of horses owned				32.67

Horses owned per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	4375	1895	43.31%
Region 2	4375	80	1.83%
Region 3	4375	533	12.18%
Region 4	4375	237	5.42%
Region 5	4375	607	13.87%
Region 6	4375	132	3.02%
Region 7	4375	537	12.27%
Region 8	4375	354	8.09%

Horses foaled in Saskatchewan ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	1895	1410	74.41%

Horses of registered stock	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	1895	1491	78.68%

Horses of pedigree not yet registered	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	404	19	4.70%

Herd Profile ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MANY
Mares of breeding age	1895	1172	61.85%	
Mares bred this season	1172	1065	90.87%	
Mares expected to be bred next yr.	1172	1097	93.60%	
Stallions at stud	1895	109	5.75%	
Mares serviced in 2001	109	1176		
Average # of mares per stallion	109	10.79		
Stallions providing outside stud services	109	18	16.51%	
Revenue from stud services	18			$54,550.00
Average revenue per stallion				$3,030.56
Average stud fee per mare				$500.46

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	
Investment to purchase	1895	$2,155,025	
Estimated current market value	1895	$6,109,490	
Average capital investment / horse	$1,137.22	Average mkt. value per horse	$3,224.01

PRIMARY USE ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
Racing (thor'bred, standardbred & speed)	1895	0	0.00%
Chuck wagon racing	1895	0	0.00%
Competition (other than racing)	1895	236	12.45%
Pleasure Riding or Driving	1895	203	10.71%
Breeding Stock	1895	296	15.62%
Riding lessons	1895	6	0.32%
Commercial trail, sleigh rides / tourists	1895	0	0.00%
Work (ranching, logging, farming, etc.)	1895	73	3.85%
Companionship or full retirement	1895	71	3.75%
PMU production (pregnant mare urine)	1895	1001	52.82%
Meat production	1895	0	0.00%
Other	1895	6	0.32%

NOTE: The number of horses in PMU production distorts % ratios. Refer to Profile Pg. 9

Annual expenditure forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	58	33	56.90%	$101,250
p.a. avg. expenditure for each horse for which product/service was purchased				$53.51

Annual exp. non-forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	58	27	46.55%	$24,090
p.a. avg. expenditure for each horse for which product/service was purchased				$29.61

Annual exp. health & grooming	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	58	52	89.66%	$85,126
p.a. avg. expenditure for each horse for which product/service was purchased				$48.91

Annual exp. bedding	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	58	26	44.83%	$12,250
per annum average expenditure for each horse purchased for				$19.04

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 58

Annual exp. vet & prescriptions	MAX. SAMPLE	TOTAL REPORTED	% OF SAMPLE	HOW MUCH
	58	55	94.83%	$80,450
p.a. avg. expenditure for each horse for which product/service was purchased				$42.45

Annual exp. equine dentistry	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	58	15	25.86%	$10,650
p.a. avg. expenditure for each horse for which product/service was purchased				$24.47

Annual exp. equine therapy	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	58	13	22.41%	$2,925
p.a. avg. expenditure for each horse for which product/service was purchased				$7.36
% of therapy users who have used equine chiropractic				38.46%
% of therapy users who have used equine massage				38.46%
% of therapy users who have used equine acc:upuncture				15.38%
% of therapy users who have used other therapies				0.00%

Annual exp. farrier services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	58	47	81.03%	$45,920
p.a. avg. expenditure for each horse for which product/service was purchased				$31.52

Annual exp. replacement tack	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	58	55	94.83%	$41,890
p.a. avg. expenditure for each horse for which product/service was purchased				$22.11

Annual exp. replacement equipment	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	58	44	75.86%	$64,250
p.a. avg. expenditure for each horse for which product/service was purchased				$33.91

Annual exp. farm improvement	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	51	37	72.55%	$99,650
p.a. avg. expenditure for each horse for which product/service was purchased				$52.59

Annual exp. boarding services	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MUCH
Owners who pay boarding fees	58	8	13.79%	
Number of horses boarded/mthly fee	1895	20	1.06%	$2,760
Average monthly fee per boarded horse				$138.00

REGION 1

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY

PARTICIPATION / ACTIVITY PROFILE

Total sample size: 58

Participation Categories	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	58	19	32.76%
farm, stable or ranch manager	58	29	50.00%
breeder	58	33	56.90%
service provider	58	7	12.07%
pleasure rider	58	48	82.76%
competitor	58	30	51.72%
show organizer, judge, official	58	19	32.76%
product or service supplier	58	7	12.07%
TOTALS	58	192	331.03%

Primary Participation Category	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	58	3	5.17%
farm, stable or ranch manager	58	17	29.31%
breeder	58	10	17.24%
service provider	58	1	1.72%
pleasure rider	58	17	29.31%
competitor	58	9	15.52%
show organizer, judge, official	58	0	0.00%
product or service supplier	58	1	1.72%
TOTALS	58	58	100.00%

Offer coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from coaching services	58	10	17.24%	$36,500
			# of clients	285
			Avg. annual income from coaching services	$3,650

Offer horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from horse training services	58	8	13.79%	$51,165
			Avg. annual income from horse training services	$6,396

Pay to haul horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	58	11	18.97%	$8,600
			Average annual expenditure for each horse hauled	$148

Purchase coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	58	13	22.41%	$11,340
			Average per annum expenditure per coaching student	$872

Purchase horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	58	25	43.10%	$51,165
			Average per annum expenditure per training services client	$2,225

Competitor	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	58	31	53.45%

Competitions entered in 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	31	31	100.00%	308
			Average # of competitions per competitor	9.94

Sport / competition disciplines	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Western Pleasure	31	10	32.26%
Team Cattle Penning	31	3	9.68%
Dressage	31	5	16.13%
Barrel Racing / Pole Bending	31	6	19.35%
Hunter / Jumper	31	6	19.35%
Halter/ Line Classes	31	6	19.35%
Reining	31	1	3.23%
Roping (including team roping)	31	3	9.68%
Driving	31	2	6.45%
Cutting	31	1	3.23%
Racing	31	0	0.00%
Gymkhana	31	3	9.68%
Rodeo	31	1	3.23%
Other (not listed)	31	0	0.00%
Endurance Riding	31	0	0.00%
Saddleseat	31	1	3.23%
Chuck wagon racing	31	0	0.00%
Eventing	31	0	0.00%
Polo	31	0	0.00%
TOTALS		48	154.84%

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 58

Entered More or less shows than 2000	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	31	11	35.48%
LESS	31	12	38.71%
THE SAME #	31	7	22.58%

Expect to enter in 2002 compared 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	31	17	54.84%
LESS	31	1	3.23%
THE SAME #	31	13	41.94%

Cost to compete 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	31	26	83.87%	$63,057
Average cost per competitor				$2,425
Average cost per show				$205

Regularly ride on public lands	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	58	15	25.86%

Would ride on public lands if avail.	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	43	27	62.79%

Volunteer hours on club activities	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	58	50	86.21%	3,902
Average hours per volunteer				78.03

Wishes to participate in focus group	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	58	46	79.31%

REGION 2

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE

Total sample size: 30

Respondents per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	355	58	16.34%
Region 2	355	30	8.45%
Region 3	355	57	16.06%
Region 4	355	27	7.61%
Region 5	355	53	14.93%
Region 6	355	23	6.48%
Region 7	355	61	17.18%
Region 8	355	46	12.96%

Gender	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Female	30	20	66.67%
Male	30	10	33.33%

Age Group:	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
18 to 19	30	0	0.00%	
20 to 29	30	1	3.33%	
30 to 39	30	7	23.33%	
40 to 49	**30**	**8**	**26.67%**	**MEDIAN**
50 to 59	30	6	20.00%	
Over 60	30	8	26.67%	

Attended College or University	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	30	18	60.00%
NO	30	12	40.00%

Annual Household Income	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
Less than $40,000 per year	30	6	20.00%	
$40,000 to $60,000 per year	**30**	**9**	**30.00%**	**MEDIAN**
$60,000 to $80,000 per year	30	7	23.33%	
$80,000 to $100,000 per year	30	2	6.67%	
Over $100,000 per year	30	2	6.67%	

% of Annual Income from Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
>50% of personal annual income	30	1	3.33%
>50% of household annual income	30	0	0.00%

How long riding/driving horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't ride or drive	30	0	0.00%
Less than 5 years	30	1	3.33%
Five to 10 years	30	6	20.00%
More than 10 years	30	23	76.67%

Adults in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	30	30	100.00%	55
Adults in household who ride ...				37
Average # of adults per household who ride				1.23

Children in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	30	10	33.33%	10
Children in household who ride ...				3
Average # of children per household who ride ...				0.30

Member of Club or Association	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	30	27	90.00%	57
Average # of clubs per member				2.11
Volunteer hours per year on club activities				1,409
Average # of volunteer hours per member				52.19

Live on same property as horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	25	11	44.00%	
Total acreage all properties				495
Average # of acres per property				45
Average # of acres per horse				6

Employ people to care for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	11	2	18.18%	103
# of non-family full-time employees				2.58
Average # non-family employees per employer				1.29

See need for standardized staff training	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	2	2	100.00%

REGION 2

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **PEOPLE PROFILE** — **Total sample size: 30**

Use the Internet	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	30	19	63.33%
Non users who expect to use in next year	11	4	36.36%
Have E-mail	19	17	89.47%

Own computers	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	30	21	70.00%
Expect to purchase within 1 year	9	1	11.11%

Carry liability insurance for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	30	18	60.00%

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	30	25	83.33%	80
Non-owners, expect to own in 5 yrs	5	2	40.00%	
Average # of horses owned				3.20

Own horses through syndicate	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	25	2	8.00%	2.00
Average "equivalent horses" owned				1.00

How long owned horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't own horses	30	5	16.67%
Less than 5 years	25	0	0.00%
Five to 10 years	25	9	36.00%
More than 10 years	25	16	64.00%

Own more/less horses than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
MORE	25	6	24.00%	16
LESS	25	6	24.00%	12
THE SAME #	25	13	52.00%	
Net increase/decrease in herd size			5.00%	4

Care for other peoples' horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	30	10	33.33%	116
Average # of other peoples' horses cared for				12

Horses expected to own in 5 yrs	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	25	8	32.00%
LESS	25	3	12.00%
THE SAME #	25	13	52.00%
Non-owners who expect to own	5	2	40.00%

Other people ride their horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	25	7	28.00%	
# of horses ridden by other people	80	16	20.00%	
# of people riding				171
# of adults				68
# of children				103
Average # of riders per year per horse in use				10.7

More or less people than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	7	2	28.57%
LESS	7	1	14.29%
THE SAME #	7	4	57.14%

Sell Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	25	7	28.00%	11
Horses sold to riding/driving market	11	8	72.73%	
Horses sold to meat market	11	2	18.18%	

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Investment to purchase	80	$225,900	$2,823.75

Capital invested tack & equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Tack & harness	80	$123,500	$1,543.75

Capital invested horse equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse business equipment	80	$173,850	$2,173.13

Capital invested horse farm improvmts	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse-related farm improvements	80	$370,000	$4,625.00

REGION 2

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **HORSE HERD PROFILE** — **Total sample size: 30**

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	30	25	83.33%	80
Non-owners, expect to own in 5 yrs	5	2	40.00%	
Average # of horses owned				3.20

Horses owned per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	4375	1895	43.31%
Region 2	4375	80	1.83%
Region 3	4375	533	12.18%
Region 4	4375	237	5.42%
Region 5	4375	607	13.87%
Region 6	4375	132	3.02%
Region 7	4375	537	12.27%
Region 8	4375	354	8.09%

Horses foaled in Saskatchewan ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	80	63	78.75%

Horses of registered stock	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	80	62	77.50%

Horses of pedigree not yet registered	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	18	3	16.67%

Herd Profile ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MANY
Mares of breeding age	80	19	23.75%	
Mares bred this season	19	8	42.11%	
Mares expected to be bred next yr	19	7	36.84%	
Stallions at stud	80	5	6.25%	
Mares serviced in 2001	5	18		
Average # of mares per stallion	5	3.60		
Stallions providing outside stud services	5	1	20.00%	
Revenue from stud services	1			$1,400.00
Average revenue per stallion				$1,400.00
Average stud fee per mare				$280.00

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED		
Investment to purchase	80	$225,900		
Estimated current market value	80	$449,550		
Average capital investment / horse	$2,823.75	Average mkt. value per horse		$5,619.38

PRIMARY USE ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
Racing (thor'bred, standardbred & speed)	80	7	8.75%
Chuck wagon racing	80	0	0.00%
Competition (other than racing)	80	34	42.50%
Pleasure Riding or Driving	80	26	32.50%
Breeding Stock	80	5	6.25%
Riding lessons	80	5	6.25%
Commercial trail, sleigh rides / tourists	80	0	0.00%
Work (ranching, logging, farming, etc.)	80	2	2.50%
Companionship or full retirement	80	1	1.25%
PMU production (pregnant mare urine)	80	0	0.00%
Meat production	80	0	0.00%
Other	80	0	0.00%

NOTE: The number of horses in PMU production distorts % ratios. Refer to Profile Pg. 9

Annual expenditure forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	25	8	32.00%	$21,000
p.a. avg. expenditure for each horse for which product/service was purchased				$262.50

Annual exp. non-forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	25	15	60.00%	$4,515
p.a. avg. expenditure for each horse for which product/service was purchased				$131.25

Annual exp. health & grooming	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	25	24	96.00%	$33,480
p.a. avg. expenditure for each horse for which product/service was purchased				$454.89

Annual exp. bedding	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	25	7	28.00%	$23,820
per annum average expenditure for each horse purchased for				$875.74

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 30

Annual exp. vet & prescriptions	MAX. SAMPLE	TOTAL REPORTED	% OF SAMPLE	HOW MUCH
	25	25	100.00%	$13,770
p.a. avg. expenditure for each horse for which product/service was purchased				$172.13

Annual exp. equine dentistry	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	25	5	20.00%	$2,340
p.a. avg. expenditure for each horse for which product/service was purchased				$127.17

Annual exp. equine therapy	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	25	6	24.00%	$860
p.a. avg. expenditure for each horse for which product/service was purchased				$51.19
% of therapy users who have used equine chiropractic				66.67%
% of therapy users who have used equine massage				33.33%
% of therapy users who have used equine accupuncture				16.67%
% of therapy users who have used other therapies				16.67%

Annual exp. farrier services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	25	21	84.00%	$18,080
p.a. avg. expenditure for each horse for which product/service was purchased				$293.51

Annual exp. replacement tack	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	25	24	96.00%	$14,295
p.a. avg. expenditure for each horse for which product/service was purchased				$178.69

Annual exp. replacement equipment	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	25	19	76.00%	$7,900
p.a. avg. expenditure for each horse for which product/service was purchased				$98.75

Annual exp. farm improvement	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	11	9	81.82%	$11,800
p.a. avg. expenditure for each horse for which product/service was purchased				$147.50

Annual exp. boarding services	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MUCH
Owners who pay boarding fees	25	13	52.00%	
Number of horses boarded/mthly fee	80	19	23.75%	$2,480
Average monthly fee per boarded horse				$130.53

REGION 2

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **PARTICIPATION / ACTIVITY PROFILE** — **Total sample size: 30**

Participation Categories	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	30	7	23.33%
farm, stable or ranch manager	30	5	16.67%
breeder	30	4	13.33%
service provider	30	2	6.67%
pleasure rider	30	25	83.33%
competitor	30	15	50.00%
show organizer, judge, official	30	11	36.67%
product or service supplier	30	2	6.67%
TOTALS	**30**	**71**	**236.67%**

Primary Participation Category	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	30	4	13.33%
farm, stable or ranch manager	30	2	6.67%
breeder	30	1	3.33%
service provider	30	1	3.33%
pleasure rider	30	16	53.33%
competitor	30	4	13.33%
show organizer, judge, official	30	2	6.67%
product or service supplier	30	0	0.00%
TOTALS	**30**	**30**	**100.00%**

Offer coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from coaching services	30	4	13.33%	$2,000
# of clients				14
Avg. annual income from coaching services				$500

Offer horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from horse training services	30	2	6.67%	$15,950
Avg. annual income from horse training services				$7,975

Pay to haul horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	25	6	24.00%	$2,100
Average annual expenditure for each horse hauled				$84

Purchase coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	30	10	33.33%	$8,415
Average per annum expenditure per coaching student				$935

Purchase horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	30	6	20.00%	$15,950
Average per annum expenditure per training services client				$2,658

Competitor	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	30	18	60.00%

Competitions entered in 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	18	18	100.00%	115
Average # of competitions per competitor				6.39

Sport / competition disciplines	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Western Pleasure	18	4	22.22%
Team Cattle Penning	18	1	5.56%
Dressage	18	6	33.33%
Barrel Racing / Pole Bending	18	1	5.56%
Hunter / Jumper	18	1	5.56%
Halter/ Line Classes	18	2	11.11%
Reining	18	1	5.56%
Roping (including team roping)	18	0	0.00%
Driving	18	1	5.56%
Cutting	18	0	0.00%
Racing	18	2	11.11%
Gymkhana	18	2	11.11%
Rodeo	18	1	5.56%
Other (not listed)	18	4	22.22%
Endurance Riding	18	0	0.00%
Saddleseat	18	0	0.00%
Chuck wagon racing	18	0	0.00%
Eventing	18	0	0.00%
Polo	18	0	0.00%
TOTALS		**26**	**144.44%**

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 30

Entered More or less shows than 2000	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	18	3	16.67%
LESS	18	9	50.00%
THE SAME #	18	5	27.78%

Expect to enter in 2002 compared 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	18	9	50.00%
LESS	18	2	11.11%
THE SAME #	18	7	38.89%

Cost to compete 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	18	13	72.22%	$21,310
Average cost per competitor				$1,639
Average cost per show				$185

Regularly ride on public lands	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	30	8	26.67%

Would ride on public lands if avail.	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	22	15	68.18%

Volunteer hours on club activities	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	30	25	83.33%	1,409
Average hours per volunteer				56.36

Wishes to participate in focus group	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	30	25	83.33%

REGION 3

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 57

Respondents per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	355	58	16.34%
Region 2	355	30	8.45%
Region 3	355	57	16.06%
Region 4	355	27	7.61%
Region 5	355	53	14.93%
Region 6	355	23	6.48%
Region 7	355	61	17.18%
Region 8	355	46	12.96%

Gender	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Female	57	34	59.65%
Male	57	23	40.35%

Age Group:	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
18 to 19	57	1	1.75%	
20 to 29	57	3	5.26%	
30 to 39	57	12	21.05%	
40 to 49	**57**	**21**	**36.84%**	**MEDIAN**
50 to 59	57	11	19.30%	
Over 60	57	8	14.04%	

Attended College or University	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	57	32	56.14%
NO	57	25	43.86%

Annual Household Income	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
Less than $40,000 per year	57	12	21.05%	
$40,000 to $60,000 per year	**57**	**16**	**28.07%**	**MEDIAN**
$60,000 to $80,000 per year	57	8	14.04%	
$80,000 to $100,000 per year	57	3	5.26%	
Over $100,000 per year	57	9	15.79%	

% of Annual Income from Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
>50% of personal annual income	57	2	3.51%
>50% of household annual income	57	0	0.00%

How long riding/driving horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't ride or drive	57	4	7.02%
Less than 5 years	57	1	1.75%
Five to 10 years	57	2	3.51%
More than 10 years	57	50	87.72%

Adults in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	57	57	100.00%	120
Adults in household who ride ...				94
Average # of adults per household who ride				1.65

Children in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	57	29	50.88%	48
Children in household who ride ...				38
Average # of children per household who ride ...				1.31

Member of Club or Association	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	57	51	89.47%	104
Average # of clubs per member				2.04
Volunteer hours per year on club activities				4,789
Average # of volunteer hours per member				93.90

Live on same property as horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	55	46	83.64%	
Total acreage all properties				56,091
Average # of acres per property				1219
Average # of acres per horse				105

Employ people to care for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	46	2	4.35%	25
# of non-family full-time employees				0.63
Average # non-family employees per employer				0.31

See need for standardized staff training	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	2	2	100.00%

REGION 3

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **PEOPLE PROFILE** — **Total sample size: 57**

Use the Internet	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	57	37	64.91%
Non users who expect to use in next year	20	5	25.00%
Have E-mail	37	35	94.59%

Own computers	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	57	44	77.19%
Expect to purchase within 1 year	13	2	15.38%

Carry liability insurance for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	57	26	45.61%

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	57	55	96.49%	533
Non-owners, expect to own in 5 yrs	2	0	0.00%	
Average # of horses owned				9.69

Own horses through syndicate	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	55	3	5.45%	3.00
Average "equivalent horses" owned				1.00

How long owned horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't own horses	57	2	3.51%
Less than 5 years	55	1	1.82%
Five to 10 years	55	6	10.91%
More than 10 years	55	47	85.45%

Own more/less horses than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
MORE	55	26	47.27%	106
LESS	55	13	23.64%	82
THE SAME #	55	15	27.27%	
Net increase/decrease in herd size			4.50%	24

Care for other peoples' horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	57	14	24.56%	87
Average # of other peoples' horses cared for				6

Horses expected to own in 5 yrs	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	55	14	25.45%
LESS	55	12	21.82%
THE SAME #	55	28	50.91%
Non-owners who expect to own	2	0	0.00%

Other people ride their horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	55	13	23.64%	
# of horses ridden by other people	533	31	5.82%	
# of people riding				75
# of adults				30
# of children				45
Average # of riders per year per horse in use				2.4

More or less people than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	13	6	46.15%
LESS	13	1	7.69%
THE SAME #	13	5	38.46%

Sell Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	55	28	50.91%	104
Horses sold to riding/driving market	104	90	86.54%	
Horses sold to meat market	104	0	0.00%	

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Investment to purchase	533	$599,100	$1,124.02

Capital invested tack & equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Tack & harness	533	$403,300	$756.66

Capital invested horse equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse business equipment	533	$544,200	$1,021.01

Capital invested horse farm improvmts	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse-related farm improvements	533	$862,800	$1,618.76

REGION 3

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 57

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	57	55	96.49%	533
Non-owners, expect to own in 5 yrs	2	0	0.00%	
Average # of horses owned				9.69

Horses owned per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	4375	1895	43.31%
Region 2	4375	80	1.83%
Region 3	4375	533	12.18%
Region 4	4375	237	5.42%
Region 5	4375	607	13.87%
Region 6	4375	132	3.02%
Region 7	4375	537	12.27%
Region 8	4375	354	8.09%

Horses foaled in Saskatchewan ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	533	451	84.62%

Horses of registered stock	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	533	397	74.48%

Horses of pedigree not yet registered	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	136	13	9.56%

Herd Profile ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MANY
Mares of breeding age	533	224	42.03%	
Mares bred this season	224	124	55.36%	
Mares expected to be bred next yr.	224	142	63.39%	
Stallions at stud	533	23	4.32%	
Mares serviced in 2001	23	132		
Average # of mares per stallion	23	5.74		
Stallions providing outside stud services	23	5	21.74%	
Revenue from stud services	5			$16,500.00
Average revenue per stallion				$3,300.00
Average stud fee per mare				$717.39

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED		
Investment to purchase	533	$599,100		
Estimated current market value	533	$1,458,000		
Average capital investment / horse	$1,124.02	Average mkt. value per horse		$2,735.46

PRIMARY USE ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
Racing (thor'bred, standardbred & speed)	533	2	0.38%
Chuck wagon racing	533	0	0.00%
Competition (other than racing)	533	116	21.76%
Pleasure Riding or Driving	533	105	19.70%
Breeding Stock	533	163	30.58%
Riding lessons	533	10	1.88%
Commercial trail, sleigh rides / tourists	533	24	4.50%
Work (ranching, logging, farming, etc.)	533	103	19.32%
Companionship or full retirement	533	9	1.69%
PMU production (pregnant mare urine)	533	0	0.00%
Meat production	533	0	0.00%
Other	533	1	0.19%

NOTE: The number of horses in PMU production distorts % ratios. Refer to Profile Pg. 9

Annual expenditure forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	19	34.55%	$50,575
p.a. avg. expenditure for each horse for which product/service was purchased				$94.89

Annual exp. non-forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	30	54.55%	$19,590
p.a. avg. expenditure for each horse for which product/service was purchased				$85.47

Annual exp. health & grooming	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	53	96.36%	$31,143
p.a. avg. expenditure for each horse for which product/service was purchased				$63.51

Annual exp. bedding	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	17	30.91%	$9,320
per annum average expenditure for each horse purchased for				$51.43

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 57

Annual exp. vet & prescriptions	MAX. SAMPLE	TOTAL REPORTED	% OF SAMPLE	HOW MUCH
	55	52	94.55%	$32,015
p.a. avg. expenditure for each horse for which product/service was purchased				$60.07

Annual exp. equine dentistry	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	8	14.55%	$3,250
p.a. avg. expenditure for each horse for which product/service was purchased				$26.51

Annual exp. equine therapy	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	14	25.45%	$1,130
p.a. avg. expenditure for each horse for which product/service was purchased				$10.10
% of therapy users who have used equine chiropractic				64.29%
% of therapy users who have used equine massage				14.29%
% of therapy users who have used equine accupuncture				0.00%
% of therapy users who have used other therapies				0.00%

Annual exp. farrier services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	37	67.27%	$20,730
p.a. avg. expenditure for each horse for which product/service was purchased				$50.51

Annual exp. replacement tack	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	51	92.73%	$18,065
p.a. avg. expenditure for each horse for which product/service was purchased				$33.89

Annual exp. replacement equipment	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	36	65.45%	$51,950
p.a. avg. expenditure for each horse for which product/service was purchased				$97.47

Annual exp. farm improvement	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	46	37	80.43%	$27,930
p.a. avg. expenditure for each horse for which product/service was purchased				$52.40

Annual exp. boarding services	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MUCH
Owners who pay boarding fees	55	7	12.73%	
Number of horses boarded/mthly fee	533	13	2.44%	$1,050
Average monthly fee per boarded horse				$80.77

REGION 3

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **PARTICIPATION / ACTIVITY PROFILE** — **Total sample size: 57**

Participation Categories	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	57	15	26.32%
farm, stable or ranch manager	57	28	49.12%
breeder	57	20	35.09%
service provider	57	1	1.75%
pleasure rider	57	50	87.72%
competitor	57	25	43.86%
show organizer, judge, official	57	11	19.30%
product or service supplier	57	3	5.26%
TOTALS	**57**	**153**	**268.42%**

Primary Participation Category	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	57	3	5.26%
farm, stable or ranch manager	57	9	15.79%
breeder	57	6	10.53%
service provider	57	0	0.00%
pleasure rider	57	28	49.12%
competitor	57	7	12.28%
show organizer, judge, official	57	4	7.02%
product or service supplier	57	0	0.00%
TOTALS	**57**	**57**	**100.00%**

Offer coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from coaching services	57	8	14.04%	$8,300
			# of clients	67
			Avg. annual income from coaching services	$1,038

Offer horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from horse training services	57	8	14.04%	$28,290
			Avg. annual income from horse training services	$3,536

Pay to haul horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	5	9.09%	$1,700
			Average annual expenditure for each horse hauled	$31

Purchase coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	57	23	40.35%	$8,630
			Average per annum expenditure per coaching student	$392

Purchase horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	57	14	24.56%	$28,290
			Average per annum expenditure per training services client	$2,021

Competitor	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	57	26	45.61%

Competitions entered in 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	26	25	96.15%	176
			Average # of competitions per competitor	7.04

Sport / competition disciplines	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Western Pleasure	26	5	19.23%
Team Cattle Penning	26	4	15.38%
Dressage	26	3	11.54%
Barrel Racing / Pole Bending	26	6	23.08%
Hunter / Jumper	26	4	15.38%
Halter/ Line Classes	26	5	19.23%
Reining	26	6	23.08%
Roping (including team roping)	26	2	7.69%
Driving	26	2	7.69%
Cutting	26	3	11.54%
Racing	26	1	3.85%
Gymkhana	26	1	3.85%
Rodeo	26	2	7.69%
Other (not listed)	26	5	19.23%
Endurance Riding	26	3	11.54%
Saddleseat	26	1	3.85%
Chuck wagon racing	26	0	0.00%
Eventing	26	0	0.00%
Polo	26	0	0.00%
TOTALS		**53**	**203.85%**

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 57

Entered More or less shows than 2000	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	26	6	23.08%
LESS	26	12	46.15%
THE SAME #	26	7	26.92%

Expect to enter in 2002 compared 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	26	17	65.38%
LESS	26	0	0.00%
THE SAME #	26	8	30.77%

Cost to compete 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	26	18	69.23%	$16,275
Average cost per competitor				$904
Average cost per show				$92

Regularly ride on public lands	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	57	21	36.84%

Would ride on public lands if avail.	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	36	21	58.33%

Volunteer hours on club activities	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	57	49	85.96%	4,789
Average hours per volunteer				97.73

Wishes to participate in focus group	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	57	47	82.46%

REGION 4

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **PEOPLE PROFILE** — **Total sample size: 27**

Respondents per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	355	58	16.34%
Region 2	355	30	8.45%
Region 3	355	57	16.06%
Region 4	355	27	7.61%
Region 5	355	53	14.93%
Region 6	355	23	6.48%
Region 7	355	61	17.18%
Region 8	355	46	12.96%

Gender	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Female	27	19	70.37%
Male	27	8	29.63%

Age Group:	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
18 to 19	27	0	0.00%	
20 to 29	27	0	0.00%	
30 to 39	27	5	18.52%	
40 to 49	**27**	**10**	**37.04%**	**MEDIAN**
50 to 59	27	8	29.63%	
Over 60	27	4	14.81%	

Attended College or University	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	27	15	55.56%
NO	27	12	44.44%

Annual Household Income	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
Less than $40,000 per year	27	9	33.33%	
$40,000 to $60,000 per year	**27**	**6**	**22.22%**	**MEDIAN**
$60,000 to $80,000 per year	27	6	22.22%	
$80,000 to $100,000 per year	27	2	7.41%	
Over $100,000 per year	27	2	7.41%	

% of Annual Income from Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
>50% of personal annual income	27	2	7.41%
>50% of household annual income	27	1	3.70%

How long riding/driving horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't ride or drive	27	0	0.00%
Less than 5 years	27	1	3.70%
Five to 10 years	27	1	3.70%
More than 10 years	27	24	88.89%

Adults in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	27	27	100.00%	54
Adults in household who ride ...				43
Average # of adults per household who ride				1.59

Children in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	27	12	44.44%	14
Children in household who ride ...				10
Average # of children per household who ride ...				0.83

Member of Club or Association	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	27	23	85.19%	51
Average # of clubs per member				2.22
Volunteer hours per year on club activities				1,062
Average # of volunteer hours per member				46.17

Live on same property as horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	26	23	88.46%	
Total acreage all properties				6,147
Average # of acres per property				267
Average # of acres per horse				26

Employ people to care for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	23	2	8.70%	50
# of non-family full-time employees				1.25
Average # non-family employees per employer				0.63

See need for standardized staff training	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	2	1	50.00%

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 27

Use the Internet	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	27	16	59.26%
Non users who expect to use in next year	11	4	36.36%
Have E-mail	16	15	93.75%

Own computers	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	27	17	62.96%
Expect to purchase within 1 year	10	3	30.00%

Carry liability insurance for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	27	10	37.04%

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	27	26	96.30%	237
Non-owners, expect to own in 5 yrs	1	0	0.00%	
Average # of horses owned				9.12

Own horses through syndicate	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	26	1	3.85%	2.00
Average "equivalent horses" owned				2.00

How long owned horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't own horses	27	1	3.70%
Less than 5 years	26	0	0.00%
Five to 10 years	26	2	7.69%
More than 10 years	26	24	92.31%

Own more/less horses than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
MORE	26	9	34.62%	85
LESS	26	10	38.46%	51
THE SAME #	26	7	26.92%	
Net increase/decrease in herd size			14.35%	34

Care for other peoples' horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	27	1	3.70%	3
Average # of other peoples' horses cared for				3

Horses expected to own in 5 yrs	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	26	6	23.08%
LESS	26	5	19.23%
THE SAME #	26	14	53.85%
Non-owners who expect to own	1	0	0.00%

Other people ride their horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	26	4	15.38%	
# of horses ridden by other people	237	9	3.80%	
# of people riding				40
# of adults				16
# of children				24
Average # of riders per year per horse in use				4.4

More or less people than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	4	2	50.00%
LESS	4	0	0.00%
THE SAME #	4	1	25.00%

Sell Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	26	10	38.46%	41
Horses sold to riding/driving market	41	31	75.61%	
Horses sold to meat market	41	9	21.95%	

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Investment to purchase	237	$223,700	$943.88

Capital invested tack & equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Tack & harness	237	$207,500	$875.53

Capital invested horse equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse business equipment	237	$230,950	$974.47

Capital invested horse farm improvmts	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse-related farm improvements	237	$471,800	$1,990.72

REGION 4

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE

Total sample size: 27

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	27	26	96.30%	237
Non-owners, expect to own in 5 yrs	1	0	0.00%	
Average # of horses owned				9.12

Horses owned per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	4375	1895	43.31%
Region 2	4375	80	1.83%
Region 3	4375	533	12.18%
Region 4	4375	237	5.42%
Region 5	4375	607	13.87%
Region 6	4375	132	3.02%
Region 7	4375	537	12.27%
Region 8	4375	354	8.09%

Horses foaled in Saskatchewan ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	237	219	92.41%

Horses of registered stock	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	237	185	78.06%

Horses of pedigree not yet registered	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	52	3	5.77%

Herd Profile ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MANY
Mares of breeding age	237	103	43.46%	
Mares bred this season	103	33	32.04%	
Mares expected to be bred next yr.	103	36	34.95%	
Stallions at stud	237	10	4.22%	
Mares serviced in 2001	10	47		
Average # of mares per stallion	10	4.70		
Stallions providing outside stud services	10	5	50.00%	
Revenue from stud services	5			$1,700.00
Average revenue per stallion				$340.00
Average stud fee per mare				$170.00

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	
Investment to purchase	237	$223,700	
Estimated current market value	237	$570,500	
Average capital investment / horse	$943.88	Average mkt. value per horse	$2,407.17

PRIMARY USE ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
Racing (thor'bred, standardbred & speed)	237	3	1.27%
Chuck wagon racing	237	0	0.00%
Competition (other than racing)	237	38	16.03%
Pleasure Riding or Driving	237	74	31.22%
Breeding Stock	237	70	29.54%
Riding lessons	237	3	1.27%
Commercial trail, sleigh rides / tourists	237	8	3.38%
Work (ranching, logging, farming, etc.)	237	12	5.06%
Companionship or full retirement	237	14	5.91%
PMU production (pregnant mare urine)	237	13	5.49%
Meat production	237	2	0.84%
Other	237	0	0.00%

NOTE: The number of horses in PMU production distorts % ratios. Refer to Profile Pg. 9

Annual expenditure forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	26	9	34.62%	$15,925
p.a. avg. expenditure for each horse for which product/service was purchased				$67.19

Annual exp. non-forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	26	14	53.85%	$11,940
p.a. avg. expenditure for each horse for which product/service was purchased				$117.16

Annual exp. health & grooming	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	26	26	100.00%	$15,035
p.a. avg. expenditure for each horse for which product/service was purchased				$68.96

Annual exp. bedding	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	26	10	38.46%	$3,635
per annum average expenditure for each horse purchased for				$45.11

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 27

Annual exp. vet & prescriptions	MAX. SAMPLE	TOTAL REPORTED	% OF SAMPLE	HOW MUCH
	26	26	100.00%	$12,360
p.a. avg. expenditure for each horse for which product/service was purchased				$52.15

Annual exp. equine dentistry	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	26	3	11.54%	$930
p.a. avg. expenditure for each horse for which product/service was purchased				$17.06

Annual exp. equine therapy	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	26	5	19.23%	$75
p.a. avg. expenditure for each horse for which product/service was purchased				$1.51
% of therapy users who have used equine chiropractic				20.00%
% of therapy users who have used equine massage				80.00%
% of therapy users who have used equine accupuncture				0.00%
% of therapy users who have used other therapies				0.00%

Annual exp. farrier services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	26	19	73.08%	$6,785
p.a. avg. expenditure for each horse for which product/service was purchased				$37.18

Annual exp. replacement tack	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	26	24	92.31%	$5,755
p.a. avg. expenditure for each horse for which product/service was purchased				$24.28

Annual exp. replacement equipment	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	26	18	69.23%	$11,850
p.a. avg. expenditure for each horse for which product/service was purchased				$50.00

Annual exp. farm improvement	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	23	21	91.30%	$14,000
p.a. avg. expenditure for each horse for which product/service was purchased				$59.07

Annual exp. boarding services	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MUCH
Owners who pay boarding fees	26	3	11.54%	
Number of horses boarded/mthly fee	237	8	3.38%	$525
Average monthly fee per boarded horse				$65.63

REGION 4

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **PARTICIPATION / ACTIVITY PROFILE** — **Total sample size: 27**

Participation Categories	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	27	6	22.22%
farm, stable or ranch manager	27	10	37.04%
breeder	27	10	37.04%
service provider	27	1	3.70%
pleasure rider	27	27	100.00%
competitor	27	14	51.85%
show organizer, judge, official	27	9	33.33%
product or service supplier	27	4	14.81%
TOTALS	**27**	**81**	**300.00%**

Primary Participation Category	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	27	2	7.41%
farm, stable or ranch manager	27	1	3.70%
breeder	27	2	7.41%
service provider	27	0	0.00%
pleasure rider	27	16	59.26%
competitor	27	3	11.11%
show organizer, judge, official	27	2	7.41%
product or service supplier	27	1	3.70%
TOTALS	**27**	**27**	**100.00%**

Offer coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from coaching services	27	3	11.11%	$200
			# of clients	27
			Avg. annual income from coaching services	$67

Offer horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from horse training services	27	3	11.11%	$14,500
			Avg. annual income from horse training services	$4,833

Pay to haul horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	26	3	11.54%	$1,320
			Average annual expenditure for each horse hauled	$51

Purchase coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	27	8	29.63%	$1,970
Average per annum expenditure per coaching student				$197

Purchase horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	27	6	22.22%	$14,500
Average per annum expenditure per training services client				$2,417

Competitor	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	27	14	51.85%

Competitions entered in 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	14	14	100.00%	55
Average # of competitions per competitor				3.93

Sport / competition disciplines	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Western Pleasure	14	7	50.00%
Team Cattle Penning	14	5	35.71%
Dressage	14	2	14.29%
Barrel Racing / Pole Bending	14	2	14.29%
Hunter / Jumper	14	4	28.57%
Halter/ Line Classes	14	4	28.57%
Reining	14	5	35.71%
Roping (including team roping)	14	0	0.00%
Driving	14	2	14.29%
Cutting	14	1	7.14%
Racing	14	1	7.14%
Gymkhana	14	2	14.29%
Rodeo	14	0	0.00%
Other (not listed)	14	1	7.14%
Endurance Riding	14	1	7.14%
Saddleseat	14	1	7.14%
Chuck wagon racing	14	0	0.00%
Eventing	14	0	0.00%
Polo	14	0	0.00%
TOTALS		**38**	**271.43%**

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 27

Entered More or less shows than 2000	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	14	3	21.43%
LESS	14	9	64.29%
THE SAME #	14	2	14.29%

Expect to enter in 2002 compared 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	14	9	64.29%
LESS	14	1	7.14%
THE SAME #	14	4	28.57%

Cost to compete 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	14	10	71.43%	$13,450
Average cost per competitor				$1,345
Average cost per show				$245

Regularly ride on public lands	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	27	13	48.15%

Would ride on public lands if avail.	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	14	6	42.86%

Volunteer hours on club activities	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	27	22	81.48%	1,062
Average hours per volunteer				48.27

Wishes to participate in focus group	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	27	21	77.78%

REGION 5

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **PEOPLE PROFILE** — **Total sample size: 53**

Respondents per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	355	58	16.34%
Region 2	355	30	8.45%
Region 3	355	57	16.06%
Region 4	355	27	7.61%
Region 5	355	53	14.93%
Region 6	355	23	6.48%
Region 7	355	61	17.18%
Region 8	355	46	12.96%

Gender	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Female	53	32	60.38%
Male	53	21	39.62%

Age Group:	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
18 to 19	53	0	0.00%	
20 to 29	53	1	1.89%	
30 to 39	53	7	13.21%	
40 to 49	**53**	**21**	**39.62%**	**MEDIAN**
50 to 59	53	16	30.19%	
Over 60	53	8	15.09%	

Attended College or University	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	53	33	62.26%
NO	53	20	37.74%

Annual Household Income	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
Less than $40,000 per year	53	16	30.19%	
$40,000 to $60,000 per year	**53**	**9**	**16.98%**	**MEDIAN**
$60,000 to $80,000 per year	53	7	13.21%	
$80,000 to $100,000 per year	53	7	13.21%	
Over $100,000 per year	53	7	13.21%	

% of Annual Income from Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
>50% of personal annual income	53	4	7.55%
>50% of household annual income	53	1	1.89%

How long riding/driving horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't ride or drive	53	2	3.77%
Less than 5 years	53	1	1.89%
Five to 10 years	53	7	13.21%
More than 10 years	53	43	81.13%

Adults in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	53	53	100.00%	102
Adults in household who ride ...				81
Average # of adults per household who ride				1.53

Children in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	53	21	39.62%	42
Children in household who ride ...				32
Average # of children per household who ride ...				1.52

Member of Club or Association	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	53	47	88.68%	113
Average # of clubs per member				2.40
Volunteer hours per year on club activities				2,939
Average # of volunteer hours per member				62.53

Live on same property as horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	52	42	80.77%	
Total acreage all properties				29,648
Average # of acres per property				706
Average # of acres per horse				49

Employ people to care for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	42	5	11.90%	197
# of non-family full-time employees				4.93
Average # non-family employees per employer				0.99

See need for standardized staff training	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	5	4	80.00%

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 53

Use the Internet	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	53	37	69.81%
Non users who expect to use in next year	16	5	31.25%
Have E-mail	37	32	86.49%

Own computers	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	53	36	67.92%
Expect to purchase within 1 year	17	2	11.76%

Carry liability insurance for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	53	26	49.06%

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	53	52	98.11%	607
Non-owners, expect to own in 5 yrs	1	0	0.00%	
Average # of horses owned				11.67

Own horses through syndicate	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	52	4	7.69%	8.00
Average "equivalent horses" owned				2.00

How long owned horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't own horses	53	1	1.89%
Less than 5 years	52	1	1.92%
Five to 10 years	52	7	13.46%
More than 10 years	52	44	84.62%

Own more/less horses than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
MORE	52	18	34.62%	156
LESS	52	15	28.85%	98
THE SAME #	52	19	36.54%	
Net increase/decrease in herd size			9.56%	58

Care for other peoples' horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	53	10	18.87%	27
Average # of other peoples' horses cared for				3

Horses expected to own in 5 yrs	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	52	6	11.54%
LESS	52	20	38.46%
THE SAME #	52	25	48.08%
Non-owners who expect to own	1	0	0.00%

Other people ride their horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	52	18	34.62%	
# of horses ridden by other people	607	61	10.05%	
# of people riding				159
# of adults				64
# of children				95
Average # of riders per year per horse in use				2.6

More or less people than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	18	8	44.44%
LESS	18	2	11.11%
THE SAME #	18	5	27.78%

Sell Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	52	25	48.08%	98
Horses sold to riding/driving market	98	82	83.67%	
Horses sold to meat market	98	3	3.06%	

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Investment to purchase	607	$601,750	$991.35

Capital invested tack & equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Tack & harness	607	$366,200	$603.29

Capital invested horse equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse business equipment	607	$495,900	$816.97

Capital invested horse farm improvmts	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse-related farm improvements	607	$672,100	$1,107.25

REGION 5

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **HORSE HERD PROFILE** — **Total sample size: 53**

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	53	52	98.11%	607
Non-owners, expect to own in 5 yrs	1	0	0.00%	
Average # of horses owned				11.67

Horses owned per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	4375	1895	43.31%
Region 2	4375	80	1.83%
Region 3	4375	533	12.18%
Region 4	4375	237	5.42%
Region 5	4375	607	13.87%
Region 6	4375	132	3.02%
Region 7	4375	537	12.27%
Region 8	4375	354	8.09%

Horses foaled in Saskatchewan ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	607	436	71.83%

Horses of registered stock	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	607	491	80.89%

Horses of pedigree not yet registered	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	116	13	11.21%

Herd Profile ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MANY
Mares of breeding age	607	232	38.22%	
Mares bred this season	232	134	57.76%	
Mares expected to be bred next yr.	232	110	47.41%	
Stallions at stud	607	24	3.95%	
Mares serviced in 2001	24	173		
Average # of mares per stallion	24	7.21		
Stallions providing outside stud services	24	10	41.67%	
Revenue from stud services	10			$36,000.00
Average revenue per stallion				$3,600.00
Average stud fee per mare				$1,500.00

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED		
Investment to purchase	607	$601,750		
Estimated current market value	607	$1,255,100		
Average capital investment / horse	$991.35	Average mkt. value per horse		$2,067.71

PRIMARY USE ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
Racing (thor'bred, standardbred & speed)	607	5	0.82%
Chuck wagon racing	607	21	3.46%
Competition (other than racing)	607	181	29.82%
Pleasure Riding or Driving	607	150	24.71%
Breeding Stock	607	183	30.15%
Riding lessons	607	7	1.15%
Commercial trail, sleigh rides / tourists	607	10	1.65%
Work (ranching, logging, farming, etc.)	607	31	5.11%
Companionship or full retirement	607	15	2.47%
PMU production (pregnant mare urine)	607	1	0.16%
Meat production	607	0	0.00%
Other	607	3	0.49%

NOTE: The number of horses in PMU production distorts % ratios. Refer to Profile Pg. 9

Annual expenditure forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	52	25	48.08%	$38,850
p.a. avg. expenditure for each horse for which product/service was purchased				$64.00

Annual exp. non-forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	52	23	44.23%	$11,290
p.a. avg. expenditure for each horse for which product/service was purchased				$43.26

Annual exp. health & grooming	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	52	46	88.46%	$32,370
p.a. avg. expenditure for each horse for which product/service was purchased				$57.97

Annual exp. bedding	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	52	16	30.77%	$4,520
per annum average expenditure for each horse purchased for				$21.90

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 53

Annual exp. vet & prescriptions	MAX. SAMPLE	TOTAL REPORTED	% OF SAMPLE	HOW MUCH
	52	45	86.54%	$36,300
p.a. avg. expenditure for each horse for which product/service was purchased				$59.80

Annual exp. equine dentistry	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	52	7	13.46%	$3,611
p.a. avg. expenditure for each horse for which product/service was purchased				$25.86

Annual exp. equine therapy	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	52	13	25.00%	$2,200
p.a. avg. expenditure for each horse for which product/service was purchased				$17.26
% of therapy users who have used equine chiropractic				46.15%
% of therapy users who have used equine massage				30.77%
% of therapy users who have used equine accupuncture				15.38%
% of therapy users who have used other therapies				0.00%

Annual exp. farrier services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	52	36	69.23%	$26,410
p.a. avg. expenditure for each horse for which product/service was purchased				$56.51

Annual exp. replacement tack	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	52	47	90.38%	$18,100
p.a. avg. expenditure for each horse for which product/service was purchased				$29.82

Annual exp. replacement equipment	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	52	36	69.23%	$30,810
p.a. avg. expenditure for each horse for which product/service was purchased				$50.76

Annual exp. farm improvement	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	33	78.57%	$38,200
p.a. avg. expenditure for each horse for which product/service was purchased				$62.93

Annual exp. boarding services	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MUCH
Owners who pay boarding fees	52	11	21.15%	
Number of horses boarded/mthly fee	607	21	3.46%	$3,784
Average monthly fee per boarded horse				$180.19

REGION 5

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **PARTICIPATION / ACTIVITY PROFILE** — **Total sample size: 53**

Participation Categories	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	53	17	32.08%
farm, stable or ranch manager	53	13	24.53%
breeder	53	20	37.74%
service provider	53	2	3.77%
pleasure rider	53	49	92.45%
competitor	53	25	47.17%
show organizer, judge, official	53	10	18.87%
product or service supplier	53	6	11.32%
TOTALS	**53**	**142**	**267.92%**

Primary Participation Category	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	53	3	5.66%
farm, stable or ranch manager	53	5	9.43%
breeder	53	9	16.98%
service provider	53	1	1.89%
pleasure rider	53	22	41.51%
competitor	53	10	18.87%
show organizer, judge, official	53	1	1.89%
product or service supplier	53	2	3.77%
TOTALS	**53**	**53**	**100.00%**

Offer coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from coaching services	53	9	16.98%	$3,500
			# of clients	40
			Avg. annual income from coaching services	$389

Offer horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from horse training services	53	12	22.64%	$33,700
			Avg. annual income from horse training services	$2,808

Pay to haul horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	52	11	21.15%	$15,750
			Average annual expenditure for each horse hauled	$303

Purchase coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	53	22	41.51%	$13,550
			Average per annum expenditure per coaching student	$678

Purchase horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	53	16	30.19%	$33,700
			Average per annum expenditure per training services client	$2,247

Competitor	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	53	28	52.83%

Competitions entered in 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	28	28	100.00%	154
			Average # of competitions per competitor	5.50

Sport / competition disciplines	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Western Pleasure	28	7	25.00%
Team Cattle Penning	28	5	17.86%
Dressage	28	5	17.86%
Barrel Racing / Pole Bending	28	5	17.86%
Hunter / Jumper	28	2	7.14%
Halter/ Line Classes	28	3	10.71%
Reining	28	2	7.14%
Roping (including team roping)	28	4	14.29%
Driving	28	6	21.43%
Cutting	28	1	3.57%
Racing	28	1	3.57%
Gymkhana	28	1	3.57%
Rodeo	28	0	0.00%
Other (not listed)	28	1	3.57%
Endurance Riding	28	1	3.57%
Saddleseat	28	1	3.57%
Chuck wagon racing	28	1	3.57%
Eventing	28	0	0.00%
Polo	28	0	0.00%
TOTALS		**46**	**164.29%**

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 53

Entered More or less shows than 2000	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	28	4	14.29%
LESS	28	11	39.29%
THE SAME #	28	12	42.86%

Expect to enter in 2002 compared 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	28	13	46.43%
LESS	28	3	10.71%
THE SAME #	28	13	46.43%

Cost to compete 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	28	20	71.43%	$23,970
			Average cost per competitor	$1,199
			Average cost per show	$156

Regularly ride on public lands	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	53	17	32.08%

Would ride on public lands if avail.	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	36	18	50.00%

Volunteer hours on club activities	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	53	43	81.13%	2,939
			Average hours per volunteer	68.35

Wishes to participate in focus group	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	53	40	75.47%

REGION 6

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **PEOPLE PROFILE** — **Total sample size: 23**

Respondents per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	355	58	16.34%
Region 2	355	30	8.45%
Region 3	355	57	16.06%
Region 4	355	27	7.61%
Region 5	355	53	14.93%
Region 6	355	23	6.48%
Region 7	355	61	17.18%
Region 8	355	46	12.96%

Gender	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Female	23	17	73.91%
Male	23	6	26.09%

Age Group:	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
18 to 19	23	1	4.35%	
20 to 29	23	7	30.43%	
30 to 39	23	1	4.35%	
40 to 49	**23**	**8**	**34.78%**	**MEDIAN**
50 to 59	23	4	17.39%	
Over 60	23	2	8.70%	

Attended College or University	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	23	17	73.91%
NO	23	6	26.09%

Annual Household Income	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
Less than $40,000 per year	23	2	8.70%	
$40,000 to $60,000 per year	**23**	**7**	**30.43%**	**MEDIAN**
$60,000 to $80,000 per year	23	4	17.39%	
$80,000 to $100,000 per year	23	5	21.74%	
Over $100,000 per year	23	3	13.04%	

% of Annual Income from Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
>50% of personal annual income	23	3	13.04%
>50% of household annual income	23	0	0.00%

How long riding/driving horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't ride or drive	23	0	0.00%
Less than 5 years	23	0	0.00%
Five to 10 years	23	2	8.70%
More than 10 years	23	21	91.30%

Adults in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	23	23	100.00%	52
Adults in household who ride ...				32
Average # of adults per household who ride				1.39

Children in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	23	11	47.83%	16
Children in household who ride ...				6
Average # of children per household who ride ...				0.55

Member of Club or Association	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	23	16	69.57%	52
Average # of clubs per member				3.25
Volunteer hours per year on club activities				2,884
Average # of volunteer hours per member				180.25

Live on same property as horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	23	15	65.22%	
Total acreage all properties				1,587
Average # of acres per property				106
Average # of acres per horse				12

Employ people to care for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	15	0	0.00%	0
# of non-family full-time employees				0.00
Average # non-family employees per employer				#DIV/0!

See need for standardized staff training	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	0	0	#DIV/0!

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 23

Use the Internet	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	23	20	86.96%
Non users who expect to use in next year	3	2	66.67%
Have E-mail	20	20	100.00%

Own computers	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	23	22	95.65%
Expect to purchase within 1 year	1	1	100.00%

Carry liability insurance for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	23	12	52.17%

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	23	23	100.00%	132
Non-owners, expect to own in 5 yrs	0	0	0.00%	
Average # of horses owned				5.74

Own horses through syndicate	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	23	1	4.35%	3.00
Average "equivalent horses" owned				3.00

How long owned horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't own horses	23	0	0.00%
Less than 5 years	23	0	0.00%
Five to 10 years	23	6	26.09%
More than 10 years	23	17	73.91%

Own more/less horses than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
MORE	23	8	34.78%	35
LESS	23	6	26.09%	32
THE SAME #	23	9	39.13%	
Net increase/decrease in herd size			2.27%	3

Care for other peoples' horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	23	7	30.43%	43
Average # of other peoples' horses cared for				6

Horses expected to own in 5 yrs	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	23	5	21.74%
LESS	23	6	26.09%
THE SAME #	23	12	52.17%
Non-owners who expect to own	0	0	0.00%

Other people ride their horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	23	10	43.48%	
# of horses ridden by other people	132	24	18.18%	
# of people riding				128
# of adults				51
# of children				77
Average # of riders per year per horse in use				5.3

More or less people than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	10	7	70.00%
LESS	10	0	0.00%
THE SAME #	10	3	30.00%

Sell Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	23	11	47.83%	38
Horses sold to riding/driving market	38	37	97.37%	
Horses sold to meat market	38	1	2.63%	

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Investment to purchase	132	$240,700	$1,823.48

Capital invested tack & equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Tack & harness	132	$127,000	$962.12

Capital invested horse equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse business equipment	132	$238,000	$1,803.03

Capital invested horse farm improvmts	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse-related farm improvements	132	$514,200	$3,895.45

REGION 6

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **HORSE HERD PROFILE** — **Total sample size: 23**

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	23	23	100.00%	132
Non-owners, expect to own in 5 yrs	0	0	0.00%	
			Average # of horses owned	5.74

Horses owned per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	4375	1895	43.31%
Region 2	4375	80	1.83%
Region 3	4375	533	12.18%
Region 4	4375	237	5.42%
Region 5	4375	607	13.87%
Region 6	4375	132	3.02%
Region 7	4375	537	12.27%
Region 8	4375	354	8.09%

Horses foaled in Saskatchewan ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	132	94	71.21%

Horses of registered stock	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	132	91	68.94%

Horses of pedigree not yet registered	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	41	5	12.20%

Herd Profile ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MANY
Mares of breeding age	132	56	42.42%	
Mares bred this season	56	22	39.29%	
Mares expected to be bred next yr.	56	20	35.71%	
Stallions at stud	132	5	3.79%	
Mares serviced in 2001	5	17		
Average # of mares per stallion	5	3.40		
Stallions providing outside stud services	5	1	20.00%	
Revenue from stud services	1			$5,000.00
			Average revenue per stallion	$5,000.00
			Average stud fee per mare	$1,000.00

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	
Investment to purchase	132	$240,700	
Estimated current market value	132	$375,000	
Average capital investment / horse	$1,823.48	Average mkt. value per horse	$2,840.91

PRIMARY USE ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
Racing (thor'bred, standardbred & speed)	132	0	0.00%
Chuck wagon racing	132	0	0.00%
Competition (other than racing)	132	44	33.33%
Pleasure Riding or Driving	132	56	42.42%
Breeding Stock	132	23	17.42%
Riding lessons	132	3	2.27%
Commercial trail, sleigh rides / tourists	132	0	0.00%
Work (ranching, logging, farming, etc.)	132	2	1.52%
Companionship or full retirement	132	3	2.27%
PMU production (pregnant mare urine)	132	0	0.00%
Meat production	132	1	0.76%
Other	132	0	0.00%

NOTE: The number of horses in PMU production distorts % ratios. Refer to Profile Pg. 9

Annual expenditure forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	23	12	52.17%	$19,700
p.a. avg. expenditure for each horse for which product/service was purchased				$149.24

Annual exp. non-forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	23	17	73.91%	$8,140
p.a. avg. expenditure for each horse for which product/service was purchased				$143.41

Annual exp. health & grooming	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	23	23	100.00%	$15,850
p.a. avg. expenditure for each horse for which product/service was purchased				$130.52

Annual exp. bedding	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	23	10	43.48%	$1,920
per annum average expenditure for each horse purchased for				$42.78

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 23

Annual exp. vet & prescriptions	MAX. SAMPLE	TOTAL REPORTED	% OF SAMPLE	HOW MUCH
	23	23	100.00%	$23,470
p.a. avg. expenditure for each horse for which product/service was purchased				$177.80

Annual exp. equine dentistry	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	23	0	0.00%	$0
p.a. avg. expenditure for each horse for which product/service was purchased				$0.00

Annual exp. equine therapy	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	23	9	39.13%	$1,030
p.a. avg. expenditure for each horse for which product/service was purchased				$37.16
% of therapy users who have used equine chiropractic				55.56%
% of therapy users who have used equine massage				66.67%
% of therapy users who have used equine accupuncture				0.00%
% of therapy users who have used other therapies				0.00%

Annual exp. farrier services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	23	21	91.30%	$11,135
p.a. avg. expenditure for each horse for which product/service was purchased				$109.55

Annual exp. replacement tack	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	23	23	100.00%	$10,600
p.a. avg. expenditure for each horse for which product/service was purchased				$80.30

Annual exp. replacement equipment	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	23	16	69.57%	$4,900
p.a. avg. expenditure for each horse for which product/service was purchased				$37.12

Annual exp. farm improvement	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	15	14	93.33%	$12,400
p.a. avg. expenditure for each horse for which product/service was purchased				$93.94

Annual exp. boarding services	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MUCH
Owners who pay boarding fees	23	8	34.78%	
Number of horses boarded/mthly fee	132	18	13.64%	$2,830
Average monthly fee per boarded horse				$157.22

REGION 6

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **PARTICIPATION / ACTIVITY PROFILE** — **Total sample size: 23**

Participation Categories	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	23	9	39.13%
farm, stable or ranch manager	23	5	21.74%
breeder	23	6	26.09%
service provider	23	2	8.70%
pleasure rider	23	19	82.61%
competitor	23	11	47.83%
show organizer, judge, official	23	6	26.09%
product or service supplier	23	4	17.39%
TOTALS	**23**	**62**	**269.57%**

Primary Participation Category	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	23	3	13.04%
farm, stable or ranch manager	23	1	4.35%
breeder	23	4	17.39%
service provider	23	1	4.35%
pleasure rider	23	10	43.48%
competitor	23	4	17.39%
show organizer, judge, official	23	0	0.00%
product or service supplier	23	0	0.00%
TOTALS	**23**	**23**	**100.00%**

Offer coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from coaching services	23	7	30.43%	$54,280
			# of clients	138
			Avg. annual income from coaching services	$7,754

Offer horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from horse training services	23	5	21.74%	$4,150
			Avg. annual income from horse training services	$830

Pay to haul horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	23	6	26.09%	$4,630
			Average annual expenditure for each horse hauled	$201

Purchase coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	23	15	65.22%	$11,700
Average per annum expenditure per coaching student				$731

Purchase horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	23	3	13.04%	$4,150
Average per annum expenditure per training services client				$1,383

Competitor	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	23	13	56.52%

Competitions entered in 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	13	12	92.31%	57
Average # of competitions per competitor				4.75

Sport / competition disciplines	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Western Pleasure	13	3	23.08%
Team Cattle Penning	13	2	15.38%
Dressage	13	6	46.15%
Barrel Racing / Pole Bending	13	2	15.38%
Hunter / Jumper	13	4	30.77%
Halter/ Line Classes	13	3	23.08%
Reining	13	2	15.38%
Roping (including team roping)	13	0	0.00%
Driving	13	2	15.38%
Cutting	13	0	0.00%
Racing	13	0	0.00%
Gymkhana	13	2	15.38%
Rodeo	13	1	7.69%
Other (not listed)	13	3	23.08%
Endurance Riding	13	0	0.00%
Saddleseat	13	1	7.69%
Chuck wagon racing	13	0	0.00%
Eventing	13	0	0.00%
Polo	13	0	0.00%
TOTALS		**31**	**238.46%**

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 23

Entered More or less shows than 2000	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	13	3	23.08%
LESS	13	6	46.15%
THE SAME #	13	4	30.77%

Expect to enter in 2002 compared 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	13	6	46.15%
LESS	13	2	15.38%
THE SAME #	13	5	38.46%

Cost to compete 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	13	10	76.92%	$7,950
Average cost per competitor				$795
Average cost per show				$139

Regularly ride on public lands	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	23	9	39.13%

Would ride on public lands if avail.	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	14	9	64.29%

Volunteer hours on club activities	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	23	16	69.57%	2,884
Average hours per volunteer				180.25

Wishes to participate in focus group	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	23	19	82.61%

REGION 7

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **PEOPLE PROFILE** — **Total sample size: 61**

Respondents per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	355	58	16.34%
Region 2	355	30	8.45%
Region 3	355	57	16.06%
Region 4	355	27	7.61%
Region 5	355	53	14.93%
Region 6	355	23	6.48%
Region 7	355	61	17.18%
Region 8	355	46	12.96%

Gender	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Female	61	46	75.41%
Male	61	15	24.59%

Age Group:	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
18 to 19	61	0	0.00%	
20 to 29	61	8	13.11%	
30 to 39	61	6	9.84%	
40 to 49	**61**	**25**	**40.98%**	**MEDIAN**
50 to 59	61	11	18.03%	
Over 60	61	8	13.11%	

Attended College or University	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	61	31	50.82%
NO	61	30	49.18%

Annual Household Income	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
Less than $40,000 per year	61	18	29.51%	
$40,000 to $60,000 per year	**61**	**20**	**32.79%**	**MEDIAN**
$60,000 to $80,000 per year	61	6	9.84%	
$80,000 to $100,000 per year	61	1	1.64%	
Over $100,000 per year	61	5	8.20%	

% of Annual Income from Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
>50% of personal annual income	61	4	6.56%
>50% of household annual income	61	1	1.64%

How long riding/driving horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't ride or drive	61	2	3.28%
Less than 5 years	61	1	1.64%
Five to 10 years	61	6	9.84%
More than 10 years	61	51	83.61%

Adults in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	61	60	98.36%	132
Adults in household who ride ...				93
Average # of adults per household who ride				1.55

Children in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	61	30	49.18%	57
Children in household who ride ...				27
Average # of children per household who ride ...				0.90

Member of Club or Association	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	61	52	85.25%	120
Average # of clubs per member				2.31
Volunteer hours per year on club activities				2,939
Average # of volunteer hours per member				56.52

Live on same property as horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	55	45	81.82%	
Total acreage all properties				47,111
Average # of acres per property				1047
Average # of acres per horse				88

Employ people to care for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	45	2	4.44%	24
# of non-family full-time employees				0.60
Average # non-family employees per employer				0.30

See need for standardized staff training	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	2	2	100.00%

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 61

Use the Internet	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	61	39	63.93%
Non users who expect to use in next year	22	8	36.36%
Have E-mail	39	33	84.62%

Own computers	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	61	48	78.69%
Expect to purchase within 1 year	13	3	23.08%

Carry liability insurance for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	61	24	39.34%

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	61	55	90.16%	537
Non-owners, expect to own in 5 yrs	6	1	16.67%	
Average # of horses owned				9.76

Own horses through syndicate	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	55	4	7.27%	5.00
Average "equivalent horses" owned				1.25

How long owned horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't own horses	61	6	9.84%
Less than 5 years	55	5	9.09%
Five to 10 years	55	9	16.36%
More than 10 years	55	41	74.55%

Own more/less horses than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
MORE	55	22	40.00%	128
LESS	55	17	30.91%	72
THE SAME #	55	19	34.55%	
Net increase/decrease in herd size			10.43%	56

Care for other peoples' horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	61	13	21.31%	114
Average # of other peoples' horses cared for				9

Horses expected to own in 5 yrs	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	55	15	27.27%
LESS	55	12	21.82%
THE SAME #	55	28	50.91%
Non-owners who expect to own	6	1	16.67%

Other people ride their horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	55	13	23.64%	
# of horses ridden by other people	537	47	8.75%	
# of people riding				81
# of adults				32
# of children				49
Average # of riders per year per horse in use				1.7

More or less people than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	13	8	61.54%
LESS	13	0	0.00%
THE SAME #	13	5	38.46%

Sell Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	55	25	45.45%	98
Horses sold to riding/driving market	98	94	95.92%	
Horses sold to meat market	98	0	0.00%	

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Investment to purchase	537	$560,095	$1,043.01

Capital invested tack & equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Tack & harness	537	$543,900	$1,012.85

Capital invested horse equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse business equipment	537	$565,100	$1,052.33

Capital invested horse farm improvmts	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse-related farm improvements	537	$854,200	$1,590.69

REGION 7

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **HORSE HERD PROFILE** — **Total sample size: 61**

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	61	55	90.16%	537
Non-owners, expect to own in 5 yrs	6	1	16.67%	
Average # of horses owned				9.76

Horses owned per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	4375	1895	43.31%
Region 2	4375	80	1.83%
Region 3	4375	533	12.18%
Region 4	4375	237	5.42%
Region 5	4375	607	13.87%
Region 6	4375	132	3.02%
Region 7	4375	537	12.27%
Region 8	4375	354	8.09%

Horses foaled in Saskatchewan ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	537	411	76.54%

Horses of registered stock	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	537	358	66.67%

Horses of pedigree not yet registered	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	179	13	7.26%

Herd Profile ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MANY
Mares of breeding age	537	199	37.06%	
Mares bred this season	199	111	55.78%	
Mares expected to be bred next yr.	199	111	55.78%	
Stallions at stud	537	21	3.91%	
Mares serviced in 2001	21	93		
Average # of mares per stallion	21	4.43		
Stallions providing outside stud services	21	5	23.81%	
Revenue from stud services	5			$2,200.00
Average revenue per stallion				$440.00
Average stud fee per mare				$104.76

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED		
Investment to purchase	537	$560,095		
Estimated current market value	537	$1,268,802		
Average capital investment / horse	$1,043.01	Average mkt. value per horse		$2,362.76

PRIMARY USE ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
Racing (thor'bred, standardbred & speed)	537	4	0.74%
Chuck wagon racing	537	0	0.00%
Competition (other than racing)	537	107	19.93%
Pleasure Riding or Driving	537	123	22.91%
Breeding Stock	537	171	31.84%
Riding lessons	537	10	1.86%
Commercial trail, sleigh rides / tourists	537	3	0.56%
Work (ranching, logging, farming, etc.)	537	95	17.69%
Companionship or full retirement	537	20	3.72%
PMU production (pregnant mare urine)	537	0	0.00%
Meat production	537	0	0.00%
Other	537	4	0.74%

NOTE: The number of horses in PMU production distorts % ratios. Refer to Profile Pg. 9

Annual expenditure forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	31	56.36%	$60,050
p.a. avg. expenditure for each horse for which product/service was purchased				$111.82

Annual exp. non-forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	23	41.82%	$17,515
p.a. avg. expenditure for each horse for which product/service was purchased				$75.85

Annual exp. health & grooming	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	54	98.18%	$35,795
p.a. avg. expenditure for each horse for which product/service was purchased				$72.45

Annual exp. bedding	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	15	27.27%	$3,485
per annum average expenditure for each horse purchased for				$46.47

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 61

Annual exp. vet & prescriptions	MAX. SAMPLE	TOTAL REPORTED	% OF SAMPLE	HOW MUCH
	55	55	100.00%	$33,806
p.a. avg. expenditure for each horse for which product/service was purchased				$62.95

Annual exp. equine dentistry	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	12	21.82%	$3,275
p.a. avg. expenditure for each horse for which product/service was purchased				$26.52

Annual exp. equine therapy	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	13	23.64%	$2,000
p.a. avg. expenditure for each horse for which product/service was purchased				$17.74
% of therapy users who have used equine chiropractic				38.46%
% of therapy users who have used equine massage				61.54%
% of therapy users who have used equine accupuncture				7.69%
% of therapy users who have used other therapies				0.00%

Annual exp. farrier services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	40	72.73%	$27,294
p.a. avg. expenditure for each horse for which product/service was purchased				$66.01

Annual exp. replacement tack	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	49	89.09%	$23,790
p.a. avg. expenditure for each horse for which product/service was purchased				$44.30

Annual exp. replacement equipment	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	43	78.18%	$23,150
p.a. avg. expenditure for each horse for which product/service was purchased				$43.11

Annual exp. farm improvement	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	45	44	97.78%	$51,790
p.a. avg. expenditure for each horse for which product/service was purchased				$96.44

Annual exp. boarding services	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MUCH
Owners who pay boarding fees	55	7	12.73%	
Number of horses boarded/mthly fee	537	9	1.68%	$2,130
Average monthly fee per boarded horse				$236.67

REGION 7

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **PARTICIPATION / ACTIVITY PROFILE** — **Total sample size: 61**

Participation Categories	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	61	23	37.70%
farm, stable or ranch manager	61	20	32.79%
breeder	61	24	39.34%
service provider	61	7	11.48%
pleasure rider	61	52	85.25%
competitor	61	31	50.82%
show organizer, judge, official	61	17	27.87%
product or service supplier	61	4	6.56%
TOTALS	**61**	**178**	**291.80%**

Primary Participation Category	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	61	5	8.20%
farm, stable or ranch manager	61	4	6.56%
breeder	61	9	14.75%
service provider	61	2	3.28%
pleasure rider	61	25	40.98%
competitor	61	15	24.59%
show organizer, judge, official	61	1	1.64%
product or service supplier	61	0	0.00%
TOTALS	**61**	**61**	**100.00%**

Offer coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from coaching services	61	10	16.39%	$5,550
# of clients				120
Avg. annual income from coaching services				$555

Offer horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from horse training services	61	11	18.03%	$20,200
Avg. annual income from horse training services				$1,836

Pay to haul horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	55	3	5.45%	$1,650
Average annual expenditure for each horse hauled				$30

Purchase coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	61	20	32.79%	$21,050
Average per annum expenditure per coaching student				$1,169

Purchase horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	61	15	24.59%	$20,200
Average per annum expenditure per training services client				$1,443

Competitor	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	61	31	50.82%

Competitions entered in 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	31	31	100.00%	372
Average # of competitions per competitor				12.00

Sport / competition disciplines	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Western Pleasure	31	12	38.71%
Team Cattle Penning	31	13	41.94%
Dressage	31	5	16.13%
Barrel Racing / Pole Bending	31	10	32.26%
Hunter / Jumper	31	2	6.45%
Halter/ Line Classes	31	3	9.68%
Reining	31	2	6.45%
Roping (including team roping)	31	5	16.13%
Driving	31	2	6.45%
Cutting	31	1	3.23%
Racing	31	1	3.23%
Gymkhana	31	3	9.68%
Rodeo	31	4	12.90%
Other (not listed)	31	1	3.23%
Endurance Riding	31	1	3.23%
Saddleseat	31	0	0.00%
Chuck wagon racing	31	0	0.00%
Eventing	31	0	0.00%
Polo	31	0	0.00%
TOTALS		**65**	**209.68%**

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 61

Entered More or less shows than 2000	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	31	7	22.58%
LESS	31	11	35.48%
THE SAME #	31	12	38.71%

Expect to enter in 2002 compared 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	31	13	41.94%
LESS	31	2	6.45%
THE SAME #	31	15	48.39%

Cost to compete 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	31	26	83.87%	$58,105
			Average cost per competitor	$2,235
			Average cost per show	$156

Regularly ride on public lands	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	61	19	31.15%

Would ride on public lands if avail.	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	42	24	57.14%

Volunteer hours on club activities	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	61	47	77.05%	2,939
			Average hours per volunteer	62.53

Wishes to participate in focus group	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	61	51	83.61%

REGION 8

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **PEOPLE PROFILE** — **Total sample size: 46**

Respondents per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	355	58	16.34%
Region 2	355	30	8.45%
Region 3	355	57	16.06%
Region 4	355	27	7.61%
Region 5	355	53	14.93%
Region 6	355	23	6.48%
Region 7	355	61	17.18%
Region 8	355	46	12.96%

Gender	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Female	46	35	76.09%
Male	46	11	23.91%

Age Group:	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
18 to 19	46	2	4.35%	
20 to 29	46	6	13.04%	
30 to 39	46	12	26.09%	
40 to 49	**46**	**15**	**32.61%**	**MEDIAN**
50 to 59	46	8	17.39%	
Over 60	46	3	6.52%	

Attended College or University	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	46	28	60.87%
NO	46	18	39.13%

Annual Household Income	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
Less than $40,000 per year	46	9	19.57%	
$40,000 to $60,000 per year	**46**	**14**	**30.43%**	**MEDIAN**
$60,000 to $80,000 per year	46	7	15.22%	
$80,000 to $100,000 per year	46	6	13.04%	
Over $100,000 per year	46	6	13.04%	

% of Annual Income from Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
>50% of personal annual income	46	5	10.87%
>50% of household annual income	46	2	4.35%

How long riding/driving horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't ride or drive	46	3	6.52%
Less than 5 years	46	1	2.17%
Five to 10 years	46	5	10.87%
More than 10 years	46	36	78.26%

Adults in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	46	46	100.00%	102
Adults in household who ride ...				73
Average # of adults per household who ride				1.59

Children in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	46	26	56.52%	39
Children in household who ride ...				30
Average # of children per household who ride ...				1.15

Member of Club or Association	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	46	36	78.26%	77
Average # of clubs per member				2.14
Volunteer hours per year on club activities				4,783
Average # of volunteer hours per member				132.86

Live on same property as horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	42	36	85.71%	
Total acreage all properties				18,230
Average # of acres per property				506
Average # of acres per horse				51

Employ people to care for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	36	0	0.00%	0
# of non-family full-time employees				0.00
Average # non-family employees per employer				0.00

See need for standardized staff training	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	0	0	0.00%

REGION 8

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **PEOPLE PROFILE** — **Total sample size: 46**

Use the Internet	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	46	33	71.74%
Non users who expect to use in next year	13	4	30.77%
Have E-mail	33	32	96.97%

Own computers	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	46	34	73.91%
Expect to purchase within 1 year	12	2	16.67%

Carry liability insurance for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	46	19	41.30%

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	46	42	91.30%	354
Non-owners, expect to own in 5 yrs	4	3	75.00%	
Average # of horses owned				8.43

Own horses through syndicate	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	42	3	7.14%	6.00
Average "equivalent horses" owned				2.00

How long owned horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't own horses	46	4	8.70%
Less than 5 years	42	1	2.38%
Five to 10 years	42	8	19.05%
More than 10 years	42	33	78.57%

Own more/less horses than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
MORE	42	21	50.00%	91
LESS	42	10	23.81%	39
THE SAME #	42	12	28.57%	
Net increase/decrease in herd size			14.69%	52

Care for other peoples' horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	46	13	28.26%	75
Average # of other peoples' horses cared for				6

Horses expected to own in 5 yrs	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	42	15	35.71%
LESS	42	5	11.90%
THE SAME #	42	22	52.38%
Non-owners who expect to own	4	3	75.00%

Other people ride their horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	42	13	30.95%	
# of horses ridden by other people	354	36	10.17%	
# of people riding				69
# of adults				28
# of children				41
Average # of riders per year per horse in use				1.9

More or less people than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	13	8	61.54%
LESS	13	1	7.69%
THE SAME #	13	4	30.77%

Sell Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	42	14	33.33%	28
Horses sold to riding/driving market	28	27	96.43%	
Horses sold to meat market	28	0	0.00%	

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Investment to purchase	354	$338,100	$955.08

Capital invested tack & equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Tack & harness	354	$231,230	$653.19

Capital invested horse equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse business equipment	354	$425,700	$1,202.54

Capital invested horse farm improvmts	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse-related farm improvements	354	$500,000	$1,412.43

REGION 8

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **HORSE HERD PROFILE** — **Total sample size: 46**

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	46	42	91.30%	354
Non-owners, expect to own in 5 yrs	4	3	75.00%	
Average # of horses owned				8.43

Horses owned per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	4375	1895	43.31%
Region 2	4375	80	1.83%
Region 3	4375	533	12.18%
Region 4	4375	237	5.42%
Region 5	4375	607	13.87%
Region 6	4375	132	3.02%
Region 7	4375	537	12.27%
Region 8	4375	354	8.09%

Horses foaled in Saskatchewan ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	354	319	90.11%

Horses of registered stock	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	354	230	64.97%

Horses of pedigree not yet registered	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	124	10	8.06%

Herd Profile ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MANY
Mares of breeding age	354	128	36.16%	
Mares bred this season	128	82	64.06%	
Mares expected to be bred next yr.	128	101	78.91%	
Stallions at stud	354	19	5.37%	
Mares serviced in 2001	19	101		
Average # of mares per stallion	19	5.32		
Stallions providing outside stud services	19	7	36.84%	
Revenue from stud services	7			$8,500.00
Average revenue per stallion				$1,214.29
Average stud fee per mare				$447.37

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED		
Investment to purchase	354	$338,100		
Estimated current market value	354	$780,250		
Average capital investment / horse	$955.08	Average mkt. value per horse		$2,204.10

PRIMARY USE ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
Racing (thor'bred, standardbred & speed)	354	2	0.56%
Chuck wagon racing	354	0	0.00%
Competition (other than racing)	354	103	29.10%
Pleasure Riding or Driving	354	81	22.88%
Breeding Stock	354	103	29.10%
Riding lessons	354	12	3.39%
Commercial trail, sleigh rides / tourists	354	8	2.26%
Work (ranching, logging, farming, etc.)	354	41	11.58%
Companionship or full retirement	354	4	1.13%
PMU production (pregnant mare urine)	354	0	0.00%
Meat production	354	0	0.00%
Other	354	0	0.00%

NOTE: The number of horses in PMU production distorts % ratios. Refer to Profile Pg. 9

Annual expenditure forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	21	50.00%	$45,050
p.a. avg. expenditure for each horse for which product/service was purchased				$127.26

Annual exp. non-forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	21	50.00%	$6,480
p.a. avg. expenditure for each horse for which product/service was purchased				$42.57

Annual exp. health & grooming	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	41	97.62%	$21,960
p.a. avg. expenditure for each horse for which product/service was purchased				$67.43

Annual exp. bedding	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	18	42.86%	$6,480
per annum average expenditure for each horse purchased for				$53.84

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 46

Annual exp. vet & prescriptions	MAX. SAMPLE	TOTAL REPORTED	% OF SAMPLE	HOW MUCH
	42	42	100.00%	$20,800
p.a. avg. expenditure for each horse for which product/service was purchased				$58.76

Annual exp. equine dentistry	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	4	9.52%	$830
p.a. avg. expenditure for each horse for which product/service was purchased				$10.19

Annual exp. equine therapy	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	18	42.86%	$3,000
p.a. avg. expenditure for each horse for which product/service was purchased				$40.36
% of therapy users who have used equine chiropractic				61.11%
% of therapy users who have used equine massage				55.56%
% of therapy users who have used equine accupuncture				0.00%
% of therapy users who have used other therapies				0.00%

Annual exp. farrier services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	33	78.57%	$20,075
p.a. avg. expenditure for each horse for which product/service was purchased				$73.65

Annual exp. replacement tack	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	42	100.00%	$12,285
p.a. avg. expenditure for each horse for which product/service was purchased				$34.70

Annual exp. replacement equipment	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	32	76.19%	$26,550
p.a. avg. expenditure for each horse for which product/service was purchased				$75.00

Annual exp. farm improvement	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	36	32	88.89%	$15,400
p.a. avg. expenditure for each horse for which product/service was purchased				$43.50

Annual exp. boarding services	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MUCH
Owners who pay boarding fees	42	8	19.05%	
Number of horses boarded/mthly fee	354	12	3.39%	$1,870
Average monthly fee per boarded horse				$155.83

REGION 8

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **PARTICIPATION / ACTIVITY PROFILE** — **Total sample size: 46**

Participation Categories	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	46	20	43.48%
farm, stable or ranch manager	46	12	26.09%
breeder	46	13	28.26%
service provider	46	5	10.87%
pleasure rider	46	43	93.48%
competitor	46	25	54.35%
show organizer, judge, official	46	14	30.43%
product or service supplier	46	6	13.04%
TOTALS	**46**	**138**	**300.00%**

Primary Participation Category	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	46	6	13.04%
farm, stable or ranch manager	46	3	6.52%
breeder	46	2	4.35%
service provider	46	1	2.17%
pleasure rider	46	21	45.65%
competitor	46	9	19.57%
show organizer, judge, official	46	3	6.52%
product or service supplier	46	1	2.17%
TOTALS	**46**	**46**	**100.00%**

Offer coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from coaching services	46	15	32.61%	$14,750
			# of clients	96
			Avg. annual income from coaching services	$983

Offer horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from horse training services	46	10	21.74%	$5,900
			Avg. annual income from horse training services	$590

Pay to haul horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	5	11.90%	$2,800
			Average annual expenditure for each horse hauled	$67

Purchase coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	46	22	47.83%	$17,560
			Average per annum expenditure per coaching student	$798

Purchase horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	46	5	10.87%	$5,900
			Average per annum expenditure per training services client	$1,180

Competitor	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	46	27	58.70%

Competitions entered in 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	27	27	100.00%	173
			Average # of competitions per competitor	6.41

Sport / competition disciplines	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Western Pleasure	27	16	59.26%
Team Cattle Penning	27	4	14.81%
Dressage	27	3	11.11%
Barrel Racing / Pole Bending	27	1	3.70%
Hunter / Jumper	27	7	25.93%
Halter/ Line Classes	27	4	14.81%
Reining	27	4	14.81%
Roping (including team roping)	27	3	11.11%
Driving	27	1	3.70%
Cutting	27	0	0.00%
Racing	27	0	0.00%
Gymkhana	27	0	0.00%
Rodeo	27	2	7.41%
Other (not listed)	27	2	7.41%
Endurance Riding	27	2	7.41%
Saddleseat	27	0	0.00%
Chuck wagon racing	27	0	0.00%
Eventing	27	0	0.00%
Polo	27	0	0.00%
TOTALS		**49**	**181.48%**

REGION 8

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 46

Entered More or less shows than 2000	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	27	10	37.04%
LESS	27	8	29.63%
THE SAME #	27	8	29.63%

Expect to enter in 2002 compared 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	27	15	55.56%
LESS	27	3	11.11%
THE SAME #	27	8	29.63%

Cost to compete 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	27	22	81.48%	$39,255
			Average cost per competitor	$1,784
			Average cost per show	$227

Regularly ride on public lands	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	46	17	36.96%

Would ride on public lands if avail.	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	29	17	58.62%

Volunteer hours on club activities	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	46	35	76.09%	4,783
			Average hours per volunteer	136.66

Wishes to participate in focus group	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	46	40	86.96%

COACHES OR TRAINERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 29

Respondents per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	355	58	16.34%
Region 2	355	30	8.45%
Region 3	355	57	16.06%
Region 4	355	27	7.61%
Region 5	355	53	14.93%
Region 6	355	23	6.48%
Region 7	355	61	17.18%
Region 8	355	46	12.96%

Gender	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Female	29	23	79.31%
Male	29	6	20.69%

Age Group:	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
18 to 19	29	0	0.00%	
20 to 29	29	6	20.69%	
30 to 39	29	7	24.14%	
40 to 49	**29**	**6**	**20.69%**	**MEDIAN**
50 to 59	29	8	27.59%	
Over 60	29	2	6.90%	

Attended College or University	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	29	17	58.62%
NO	29	12	41.38%

Annual Household Income	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
Less than $40,000 per year	29	12	41.38%	
$40,000 to $60,000 per year	**29**	**3**	**10.34%**	**MEDIAN**
$60,000 to $80,000 per year	29	4	13.79%	
$80,000 to $100,000 per year	29	2	6.90%	
Over $100,000 per year	29	1	3.45%	

% of Annual Income from Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
>50% of personal annual income	29	7	24.14%
>50% of household annual income	29	1	3.45%

How long riding/driving horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't ride or drive	29	1	3.45%
Less than 5 years	29	0	0.00%
Five to 10 years	29	1	3.45%
More than 10 years	29	27	93.10%

Adults in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	29	29	100.00%	63
Adults in household who ride ...				42
Average # of adults per household who ride				1.45

Children in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	29	16	55.17%	19
Children in household who ride ...				14
Average # of children per household who ride ...				0.88

Member of Club or Association	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	29	27	93.10%	77
Average # of clubs per member				2.85
Volunteer hours per year on club activities				1,348
Average # of volunteer hours per member				49.93

Live on same property as horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	27	20	74.07%	
Total acreage all properties				9,075
Average # of acres per property				454
Average # of acres per horse				26

Employ people to care for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	20	1	5.00%	100
# of non-family full-time employees				2.50
Average # non-family employees per employer				2.50

See need for standardized staff training	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	1	1	100.00%

COACHES OR TRAINERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 29

Use the Internet	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	29	16	55.17%
Non users who expect to use in next year	13	4	30.77%
Have E-mail	16	15	93.75%

Own computers	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	29	17	58.62%
Expect to purchase within 1 year	12	2	16.67%

Carry liability insurance for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	29	17	58.62%

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	29	27	93.10%	346
Non-owners, expect to own in 5 yrs	2	0	0.00%	
Average # of horses owned				12.81

Own horses through syndicate	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	27	1	3.70%	1.00
Average "equivalent horses" owned				1.00

How long owned horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't own horses	29	2	6.90%
Less than 5 years	27	2	7.41%
Five to 10 years	27	3	11.11%
More than 10 years	27	22	81.48%

Own more/less horses than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
MORE	27	13	48.15%	119
LESS	27	5	18.52%	14
THE SAME #	27	9	33.33%	
Net increase/decrease in herd size			30.35%	105

Care for other peoples' horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	29	13	44.83%	95
Average # of other peoples' horses cared for				7

Horses expected to own in 5 yrs	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	27	8	29.63%
LESS	27	6	22.22%
THE SAME #	27	13	48.15%
Non-owners who expect to own	2	0	0.00%

Other people ride their horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	27	14	51.85%	
# of horses ridden by other people	346	54	15.61%	
# of people riding				269
# of adults				108
# of children				161
Average # of riders per year per horse in use				5.0

More or less people than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	14	10	71.43%
LESS	14	1	7.14%
THE SAME #	14	3	21.43%

Sell Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	27	12	44.44%	61
Horses sold to riding/driving market	61	59	96.72%	
Horses sold to meat market	61	2	3.28%	

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Investment to purchase	346	$214,800	$620.81

Capital invested tack & equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Tack & harness	346	$194,500	$562.14

Capital invested horse equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse business equipment	346	$256,700	$741.91

Capital invested horse farm improvmts	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse-related farm improvements	346	$710,000	$2,052.02

COACHES OR TRAINERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 29

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	29	27	93.10%	346
Non-owners, expect to own in 5 yrs	2	0	0.00%	
Average # of horses owned				12.81

Horses owned per participation type	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	4375	346	7.91%
farm, stable or ranch manager	4375	1343	30.70%
breeder	4375	1333	30.47%
service provider	4375	31	0.71%
pleasure rider	4375	701	16.02%
competitor	4375	420	9.60%
show organizer, judge, official	4375	137	3.13%
product or service supplier	4375	50	1.14%

Horses foaled in Saskatchewan ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	346	297	85.84%

Horses of registered stock	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	346	203	58.67%

Horses of pedigree not yet registered	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	143	4	2.80%

Herd Profile ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MANY
Mares of breeding age	346	110	31.79%	
Mares bred this season	110	76	69.09%	
Mares expected to be bred next yr.	110	79	71.82%	
Stallions at stud	346	11	3.18%	
Mares serviced in 2001	11	90		
Average # of mares per stallion	11	8.18		
Stallions providing outside stud services	11	5	45.45%	
Revenue from stud services	5			$5,700.00
Average revenue per stallion				$1,140.00
Average stud fee per mare				$518.18

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	
Investment to purchase	346	$214,800	
Estimated current market value	346	$640,500	
Average capital investment / horse	$620.81	Average mkt. value per horse	$1,851.16

PRIMARY USE ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
Racing (thor'bred, standardbred & speed)	346	2	0.58%
Chuck wagon racing	346	0	0.00%
Competition (other than racing)	346	63	18.21%
Pleasure Riding or Driving	346	61	17.63%
Breeding Stock	346	124	35.84%
Riding lessons	346	18	5.20%
Commercial trail, sleigh rides / tourists	346	16	4.62%
Work (ranching, logging, farming, etc.)	346	52	15.03%
Companionship or full retirement	346	2	0.58%
PMU production (pregnant mare urine)	346	0	0.00%
Meat production	346	0	0.00%
Other	346	8	2.31%

NOTE: The number of horses in PMU production distorts % ratios. Refer to Profile Pg. 9

Annual expenditure forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	27	14	51.85%	$43,650
p.a. avg. expenditure for each horse for which product/service was purchased				$126.16

Annual exp. non-forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	27	9	33.33%	$3,350
p.a. avg. expenditure for each horse for which product/service was purchased				$22.52

Annual exp. health & grooming	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	27	27	100.00%	$24,210
p.a. avg. expenditure for each horse for which product/service was purchased				$76.06

Annual exp. bedding	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	27	7	25.93%	$3,785
per annum average expenditure for each horse purchased for				$32.17

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 29

Annual exp. vet & prescriptions	MAX. SAMPLE	TOTAL REPORTED	% OF SAMPLE	HOW MUCH
	27	27	100.00%	$21,350
p.a. avg. expenditure for each horse for which product/service was purchased				$61.71

Annual exp. equine dentistry	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	27	6	22.22%	$3,720
p.a. avg. expenditure for each horse for which product/service was purchased				$46.75

Annual exp. equine therapy	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	27	10	37.04%	$1,135
p.a. avg. expenditure for each horse for which product/service was purchased				$15.62
% of therapy users who have used equine chiropractic				40.00%
% of therapy users who have used equine massage				60.00%
% of therapy users who have used equine accupuncture				0.00%
% of therapy users who have used other therapies				0.00%

Annual exp. farrier services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	27	19	70.37%	$15,190
p.a. avg. expenditure for each horse for which product/service was purchased				$57.02

Annual exp. replacement tack	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	27	27	100.00%	$9,370
p.a. avg. expenditure for each horse for which product/service was purchased				$27.08

Annual exp. replacement equipment	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	27	20	74.07%	$37,850
p.a. avg. expenditure for each horse for which product/service was purchased				$109.39

Annual exp. farm improvement	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	20	19	95.00%	$18,250
p.a. avg. expenditure for each horse for which product/service was purchased				$52.75

Annual exp. boarding services	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MUCH
Owners who pay boarding fees	27	5	18.52%	
Number of horses boarded/mthly fee	346	9	2.60%	$1,199
Average monthly fee per boarded horse				$133.22

COACHES OR TRAINERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 29

Participation Categories	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	29	28	96.55%
farm, stable or ranch manager	29	11	37.93%
breeder	29	10	34.48%
service provider	29	4	13.79%
pleasure rider	29	22	75.86%
competitor	29	20	68.97%
show organizer, judge, official	29	10	34.48%
product or service supplier	29	3	10.34%
TOTALS	**29**	**108**	**372.41%**

Primary Participation Category	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	29	29	100.00%
farm, stable or ranch manager	29	0	0.00%
breeder	29	0	0.00%
service provider	29	0	0.00%
pleasure rider	29	0	0.00%
competitor	29	0	0.00%
show organizer, judge, official	29	0	0.00%
product or service supplier	29	0	0.00%
TOTALS	**29**	**29**	**100.00%**

Offer coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from coaching services	29	21	72.41%	$69,840
# of clients				317
Avg. annual income from coaching services				$3,326

Offer horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from horse training services	29	16	55.17%	$2,000
Avg. annual income from horse training services				$125

Pay to haul horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	27	3	11.11%	$2,400
Average annual expenditure for each horse hauled				$89

Purchase coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	29	11	37.93%	$5,970
Average per annum expenditure per coaching student				$543

Purchase horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	29	1	3.45%	$2,000
Average per annum expenditure per training services client				$2,000

Competitor	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	29	22	75.86%

Competitions entered in 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	22	22	100.00%	111
Average # of competitions per competitor				5.05

Sport / competition disciplines	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Western Pleasure	22	14	63.64%
Team Cattle Penning	22	2	9.09%
Dressage	22	4	18.18%
Barrel Racing / Pole Bending	22	2	9.09%
Hunter / Jumper	22	6	27.27%
Halter/ Line Classes	22	5	22.73%
Reining	22	3	13.64%
Roping (including team roping)	22	1	4.55%
Driving	22	1	4.55%
Cutting	22	0	0.00%
Racing	22	1	4.55%
Gymkhana	22	0	0.00%
Rodeo	22	0	0.00%
Other (not listed)	22	3	13.64%
Endurance Riding	22	0	0.00%
Saddleseat	22	0	0.00%
Chuck wagon racing	22	0	0.00%
Eventing	22	0	0.00%
Polo	22	0	0.00%
TOTALS		**42**	**190.91%**

COACHES OR TRAINERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY | PARTICIPATION / ACTIVITY PROFILE | Total sample size: 29

Entered More or less shows than 2000	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	22	8	36.36%
LESS	22	4	18.18%
THE SAME #	22	9	40.91%

Expect to enter in 2002 compared 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	22	11	50.00%
LESS	22	2	9.09%
THE SAME #	22	8	36.36%

Cost to compete 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	22	17	77.27%	$18,502
			Average cost per competitor	$1,088
			Average cost per show	$167

Regularly ride on public lands	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	29	6	20.69%

Would ride on public lands if avail.	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	23	16	69.57%

Volunteer hours on club activities	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	29	26	89.66%	1,348
			Average hours per volunteer	51.85

Wishes to participate in focus group	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	29	22	75.86%

FARM OR STABLE MANAGERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 42

Respondents per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	355	58	16.34%
Region 2	355	30	8.45%
Region 3	355	57	16.06%
Region 4	355	27	7.61%
Region 5	355	53	14.93%
Region 6	355	23	6.48%
Region 7	355	61	17.18%
Region 8	355	46	12.96%

Gender	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Female	42	20	47.62%
Male	42	22	52.38%

Age Group:	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
18 to 19	42	0	0.00%	
20 to 29	42	0	0.00%	
30 to 39	42	11	26.19%	
40 to 49	**42**	**14**	**33.33%**	**MEDIAN**
50 to 59	42	6	14.29%	
Over 60	42	10	23.81%	

Attended College or University	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	42	19	45.24%
NO	42	23	54.76%

Annual Household Income	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
Less than $40,000 per year	42	9	21.43%	
$40,000 to $60,000 per year	**42**	**7**	**16.67%**	**MEDIAN**
$60,000 to $80,000 per year	42	7	16.67%	
$80,000 to $100,000 per year	42	4	9.52%	
Over $100,000 per year	42	11	26.19%	

% of Annual Income from Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
>50% of personal annual income	42	10	23.81%
>50% of household annual income	42	7	16.67%

How long riding/driving horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't ride or drive	42	3	7.14%
Less than 5 years	42	0	0.00%
Five to 10 years	42	3	7.14%
More than 10 years	42	36	85.71%

Adults in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	42	42	100.00%	90
Adults in household who ride ...				64
Average # of adults per household who ride				1.52

Children in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	42	28	66.67%	52
Children in household who ride ...				37
Average # of children per household who ride ...				1.32

Member of Club or Association	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	42	35	83.33%	105
Average # of clubs per member				3.00
Volunteer hours per year on club activities				2,329
Average # of volunteer hours per member				66.53

Live on same property as horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	42	40	95.24%	
Total acreage all properties				78,637
Average # of acres per property				1966
Average # of acres per horse				59

Employ people to care for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	40	5	12.50%	384
# of non-family full-time employees				9.60
Average # non-family employees per employer				1.92

See need for standardized staff training	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	5	3	60.00%

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 42

Use the Internet	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	42	24	57.14%
Non users who expect to use in next year	18	8	44.44%
Have E-mail	24	23	95.83%

Own computers	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	42	37	88.10%
Expect to purchase within 1 year	5	1	20.00%

Carry liability insurance for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	42	21	50.00%

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	42	42	100.00%	1343
Non-owners, expect to own in 5 yrs	0	0	0.00%	
Average # of horses owned				31.98

Own horses through syndicate	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	42	5	11.90%	5.00
Average "equivalent horses" owned				1.00

How long owned horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't own horses	42	0	0.00%
Less than 5 years	42	0	0.00%
Five to 10 years	42	3	7.14%
More than 10 years	42	39	92.86%

Own more/less horses than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
MORE	42	13	30.95%	113
LESS	42	11	26.19%	149
THE SAME #	42	18	42.86%	
Net increase/decrease in herd size			-2.68%	-36

Care for other peoples' horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	42	17	40.48%	291
Average # of other peoples' horses cared for				17

Horses expected to own in 5 yrs	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	42	10	23.81%
LESS	42	6	14.29%
THE SAME #	42	26	61.90%
Non-owners who expect to own	0	0	0.00%

Other people ride their horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	42	10	23.81%	
# of horses ridden by other people	1343	27	2.01%	
# of people riding				75
# of adults				30
# of children				45
Average # of riders per year per horse in use				2.8

More or less people than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	10	5	50.00%
LESS	10	1	10.00%
THE SAME #	10	4	40.00%

Sell Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	42	29	69.05%	539
Horses sold to riding/driving market	539	510	94.62%	
Horses sold to meat market	539	29	5.38%	

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Investment to purchase	1343	$1,785,975	$1,329.84

Capital invested tack & equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Tack & harness	1343	$379,300	$282.43

Capital invested horse equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse business equipment	1343	$605,800	$451.08

Capital invested horse farm improvmts	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse-related farm improvements	1343	$1,090,000	$811.62

FARM OR STABLE MANAGERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **HORSE HERD PROFILE** — **Total sample size: 42**

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	42	42	100.00%	1343
Non-owners, expect to own in 5 yrs	0	0	0.00%	
			Average # of horses owned	31.98

Horses owned per participation type	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	4375	346	7.91%
farm, stable or ranch manager	4375	1343	30.70%
breeder	4375	1333	30.47%
service provider	4375	31	0.71%
pleasure rider	4375	701	16.02%
competitor	4375	420	9.60%
show organizer, judge, official	4375	137	3.13%
product or service supplier	4375	50	1.14%

Horses foaled in Saskatchewan ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	1343	924	68.80%

Horses of registered stock	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	1343	1023	76.17%

Horses of pedigree not yet registered	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	320	12	3.75%

Herd Profile ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MANY
Mares of breeding age	1343	812	60.46%	
Mares bred this season	812	694	85.47%	
Mares expected to be bred next yr.	812	735	90.52%	
Stallions at stud	1343	72	5.36%	
Mares serviced in 2001	72	793		
Average # of mares per stallion	72	11.01		
Stallions providing outside stud services	72	11	15.28%	
Revenue from stud services	11			$55,000.00
			Average revenue per stallion	$5,000.00
			Average stud fee per mare	$763.89

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	
Investment to purchase	1343	$1,785,975	
Estimated current market value	1343	$4,767,590	
Average capital investment / horse	$1,329.84	Average mkt. value per horse	$3,549.96

PRIMARY USE ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
Racing (thor'bred, standardbred & speed)	1343	0	0.00%
Chuck wagon racing	1343	0	0.00%
Competition (other than racing)	1343	166	12.36%
Pleasure Riding or Driving	1343	152	11.32%
Breeding Stock	1343	168	12.51%
Riding lessons	1343	8	0.60%
Commercial trail, sleigh rides / tourists	1343	23	1.71%
Work (ranching, logging, farming, etc.)	1343	80	5.96%
Companionship or full retirement	1343	61	4.54%
PMU production (pregnant mare urine)	1343	681	50.71%
Meat production	1343	0	0.00%
Other	1343	4	0.30%

NOTE: The number of horses in PMU production distorts % ratios. Refer to Profile Pg. 9

Annual expenditure forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	17	40.48%	$50,600
p.a. avg. expenditure for each horse for which product/service was purchased				$37.68

Annual exp. non-forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	15	35.71%	$17,145
p.a. avg. expenditure for each horse for which product/service was purchased				$29.69

Annual exp. health & grooming	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	40	95.24%	$44,901
p.a. avg. expenditure for each horse for which product/service was purchased				$36.34

Annual exp. bedding	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	13	30.95%	$31,990
per annum average expenditure for each horse purchased for				$70.06

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 42

Annual exp. vet & prescriptions	MAX. SAMPLE	TOTAL REPORTED	% OF SAMPLE	HOW MUCH
	42	39	92.86%	$53,425
p.a. avg. expenditure for each horse for which product/service was purchased				$39.78

Annual exp. equine dentistry	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	5	11.90%	$2,050
p.a. avg. expenditure for each horse for which product/service was purchased				$6.64

Annual exp. equine therapy	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	9	21.43%	$1,500
p.a. avg. expenditure for each horse for which product/service was purchased				$5.32
% of therapy users who have used equine chiropractic				66.67%
% of therapy users who have used equine massage				55.56%
% of therapy users who have used equine accupuncture				0.00%
% of therapy users who have used other therapies				0.00%

Annual exp. farrier services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	30	71.43%	$29,860
p.a. avg. expenditure for each horse for which product/service was purchased				$28.88

Annual exp. replacement tack	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	41	97.62%	$29,425
p.a. avg. expenditure for each horse for which product/service was purchased				$21.91

Annual exp. replacement equipment	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	32	76.19%	$65,100
p.a. avg. expenditure for each horse for which product/service was purchased				$48.47

Annual exp. farm improvement	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	40	33	82.50%	$96,700
p.a. avg. expenditure for each horse for which product/service was purchased				$72.00

Annual exp. boarding services	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MUCH
Owners who pay boarding fees	42	3	7.14%	
Number of horses boarded/mthly fee	1343	9	0.67%	$1,600
Average monthly fee per boarded horse				$177.78

FARM OR STABLE MANAGERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 42

Participation Categories	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	42	18	42.86%
farm, stable or ranch manager	42	41	97.62%
breeder	42	23	54.76%
service provider	42	5	11.90%
pleasure rider	42	30	71.43%
competitor	42	16	38.10%
show organizer, judge, official	42	11	26.19%
product or service supplier	42	4	9.52%
TOTALS	**42**	**148**	**352.38%**

Primary Participation Category	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	42	0	0.00%
farm, stable or ranch manager	42	42	100.00%
breeder	42	0	0.00%
service provider	42	0	0.00%
pleasure rider	42	0	0.00%
competitor	42	0	0.00%
show organizer, judge, official	42	0	0.00%
product or service supplier	42	0	0.00%
TOTALS	**42**	**42**	**100.00%**

Offer coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from coaching services	42	7	16.67%	$10,000
			# of clients	135
			Avg. annual income from coaching services	$1,429

Offer horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from horse training services	42	8	19.05%	$28,850
			Avg. annual income from horse training services	$3,606

Pay to haul horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	4	9.52%	$2,700
			Average annual expenditure for each horse hauled	$64

Purchase coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	42	13	30.95%	$7,300
			Average per annum expenditure per coaching student	$562

Purchase horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	42	15	35.71%	$28,850
			Average per annum expenditure per training services client	$1,923

Competitor	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	42	16	38.10%

Competitions entered in 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	16	16	100.00%	122
			Average # of competitions per competitor	7.63

Sport / competition disciplines	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Western Pleasure	16	3	18.75%
Team Cattle Penning	16	4	25.00%
Dressage	16	0	0.00%
Barrel Racing / Pole Bending	16	2	12.50%
Hunter / Jumper	16	1	6.25%
Halter/ Line Classes	16	4	25.00%
Reining	16	2	12.50%
Roping (including team roping)	16	6	37.50%
Driving	16	4	25.00%
Cutting	16	1	6.25%
Racing	16	0	0.00%
Gymkhana	16	1	6.25%
Rodeo	16	0	0.00%
Other (not listed)	16	1	6.25%
Endurance Riding	16	1	6.25%
Saddleseat	16	0	0.00%
Chuck wagon racing	16	0	0.00%
Eventing	16	0	0.00%
Polo	16	0	0.00%
TOTALS		**30**	**187.50%**

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 42

Entered More or less shows than 2000	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	16	3	18.75%
LESS	16	5	31.25%
THE SAME #	16	7	43.75%

Expect to enter in 2002 compared 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	16	5	31.25%
LESS	16	0	0.00%
THE SAME #	16	11	68.75%

Cost to compete 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	16	13	81.25%	$26,880
			Average cost per competitor	$2,068
			Average cost per show	$220

Regularly ride on public lands	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	42	13	30.95%

Would ride on public lands if avail.	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	29	13	44.83%

Volunteer hours on club activities	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	42	33	78.57%	2,329
			Average hours per volunteer	70.56

Wishes to participate in focus group	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	42	34	80.95%

BREEDERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **PEOPLE PROFILE** — **Total sample size: 43**

Respondents per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	355	58	16.34%
Region 2	355	30	8.45%
Region 3	355	57	16.06%
Region 4	355	27	7.61%
Region 5	355	53	14.93%
Region 6	355	23	6.48%
Region 7	355	61	17.18%
Region 8	355	47	13.24%

Gender	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Female	43	26	60.47%
Male	43	17	39.53%

Age Group:	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
18 to 19	43	0	0.00%	
20 to 29	43	1	2.33%	
30 to 39	43	4	9.30%	
40 to 49	**43**	**20**	**46.51%**	**MEDIAN**
50 to 59	43	9	20.93%	
Over 60	43	9	20.93%	

Attended College or University	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	43	26	60.47%
NO	43	17	39.53%

Annual Household Income	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
Less than $40,000 per year	43	12	27.91%	
$40,000 to $60,000 per year	**43**	**8**	**18.60%**	**MEDIAN**
$60,000 to $80,000 per year	43	3	6.98%	
$80,000 to $100,000 per year	43	5	11.63%	
Over $100,000 per year	43	11	25.58%	

% of Annual Income from Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
>50% of personal annual income	43	9	20.93%
>50% of household annual income	43	5	11.63%

How long riding/driving horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't ride or drive	43	3	6.98%
Less than 5 years	43	1	2.33%
Five to 10 years	43	1	2.33%
More than 10 years	43	38	88.37%

Adults in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	43	43	100.00%	86
Adults in household who ride ...				68
Average # of adults per household who ride				1.58

Children in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	43	21	48.84%	32
Children in household who ride ...				17
Average # of children per household who ride ...				0.81

Member of Club or Association	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	43	42	97.67%	124
Average # of clubs per member				2.95
Volunteer hours per year on club activities				2,791
Average # of volunteer hours per member				66.45

Live on same property as horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	43	42	97.67%	
Total acreage all properties				21,116
Average # of acres per property				503
Average # of acres per horse				16

Employ people to care for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	42	4	9.52%	136
# of non-family full-time employees				3.40
Average # non-family employees per employer				0.85

See need for standardized staff training	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	4	4	100.00%

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 43

Use the Internet	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	43	28	65.12%
Non users who expect to use in next year	15	7	46.67%
Have E-mail	28	28	100.00%

Own computers	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	43	31	72.09%
Expect to purchase within 1 year	12	3	25.00%

Carry liability insurance for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	43	23	53.49%

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	43	43	100.00%	1333
Non-owners, expect to own in 5 yrs	0	0	0.00%	
Average # of horses owned				31.00

Own horses through syndicate	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	43	7	16.28%	15.00
Average "equivalent horses" owned				2.14

How long owned horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't own horses	43	0	0.00%
Less than 5 years	43	1	2.33%
Five to 10 years	43	4	9.30%
More than 10 years	43	38	88.37%

Own more/less horses than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
MORE	43	21	48.84%	269
LESS	43	9	20.93%	65
THE SAME #	43	13	30.23%	
Net increase/decrease in herd size			15.30%	204

Care for other peoples' horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	43	12	27.91%	52
Average # of other peoples' horses cared for				4

Horses expected to own in 5 yrs	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	43	6	13.95%
LESS	43	13	30.23%
THE SAME #	43	24	55.81%
Non-owners who expect to own	0	0	0.00%

Other people ride their horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	43	13	30.23%	
# of horses ridden by other people	1333	47	3.53%	
# of people riding				60
# of adults				24
# of children				36
Average # of riders per year per horse in use				1.3

More or less people than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	13	3	23.08%
LESS	13	1	7.69%
THE SAME #	13	8	61.54%

Sell Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	43	38	88.37%	451
Horses sold to riding/driving market	451	412	91.35%	
Horses sold to meat market	451	21	4.66%	

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Investment to purchase	1333	$999,500	$749.81

Capital invested tack & equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Tack & harness	1333	$392,600	$294.52

Capital invested horse equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse business equipment	1333	$778,800	$584.25

Capital invested horse farm improvmts	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse-related farm improvements	1333	$1,962,500	$1,472.24

BREEDERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 43

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	43	43	100.00%	1333
Non-owners, expect to own in 5 yrs	0	0	0.00%	
			Average # of horses owned	31.00

Horses owned per participation type	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	4375	346	7.91%
farm, stable or ranch manager	4375	1343	30.70%
breeder	4375	1333	30.47%
service provider	4375	31	0.71%
pleasure rider	4375	701	16.02%
competitor	4375	420	9.60%
show organizer, judge, official	4375	137	3.13%
product or service supplier	4375	50	1.14%

Horses foaled in Saskatchewan ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	1333	1074	80.57%

Horses of registered stock	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	1333	1130	84.77%

Horses of pedigree not yet registered	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	203	12	5.91%

Herd Profile ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MANY
Mares of breeding age	1333	727	54.54%	
Mares bred this season	727	614	84.46%	
Mares expected to be bred next yr.	727	587	80.74%	
Stallions at stud	1333	88	6.60%	
Mares serviced in 2001	88	725		
Average # of mares per stallion	88	8.24		
Stallions providing outside stud services	88	23	26.14%	
Revenue from stud services	23			$57,150.00
			Average revenue per stallion	$2,484.78
			Average stud fee per mare	$649.43

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED		
Investment to purchase	1333	$999,500		
Estimated current market value	1333	$2,820,050		
Average capital investment / horse	$749.81	Average mkt. value per horse		$2,115.57

PRIMARY USE ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
Racing (thor'bred, standardbred & speed)	1333	7	0.53%
Chuck wagon racing	1333	21	1.58%
Competition (other than racing)	1333	221	16.58%
Pleasure Riding or Driving	1333	169	12.68%
Breeding Stock	1333	471	35.33%
Riding lessons	1333	4	0.30%
Commercial trail, sleigh rides / tourists	1333	2	0.15%
Work (ranching, logging, farming, etc.)	1333	106	7.95%
Companionship or full retirement	1333	17	1.28%
PMU production (pregnant mare urine)	1333	314	23.56%
Meat production	1333	1	0.08%
Other	1333	0	0.00%

NOTE: The number of horses in PMU production distorts % ratios. Refer to Profile Pg. 9

Annual expenditure forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	43	23	53.49%	$103,150
p.a. avg. expenditure for each horse for which product/service was purchased				$77.38

Annual exp. non-forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	43	22	51.16%	$19,060
p.a. avg. expenditure for each horse for which product/service was purchased				$33.25

Annual exp. health & grooming	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	43	40	93.02%	$59,860
p.a. avg. expenditure for each horse for which product/service was purchased				$48.81

Annual exp. bedding	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	43	15	34.88%	$11,330
per annum average expenditure for each horse purchased for				$25.00

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 43

Annual exp. vet & prescriptions	MAX. SAMPLE	TOTAL REPORTED	% OF SAMPLE	HOW MUCH
	43	41	95.35%	$71,971
p.a. avg. expenditure for each horse for which product/service was purchased				$53.99

Annual exp. equine dentistry	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	43	8	18.60%	$8,750
p.a. avg. expenditure for each horse for which product/service was purchased				$28.54

Annual exp. equine therapy	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	43	9	20.93%	$1,500
p.a. avg. expenditure for each horse for which product/service was purchased				$5.36
% of therapy users who have used equine chiropractic				44.44%
% of therapy users who have used equine massage				44.44%
% of therapy users who have used equine accupuncture				11.11%
% of therapy users who have used other therapies				0.00%

Annual exp. farrier services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	43	35	81.40%	$36,299
p.a. avg. expenditure for each horse for which product/service was purchased				$35.37

Annual exp. replacement tack	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	43	41	95.35%	$17,045
p.a. avg. expenditure for each horse for which product/service was purchased				$12.79

Annual exp. replacement equipment	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	43	36	83.72%	$46,950
p.a. avg. expenditure for each horse for which product/service was purchased				$35.22

Annual exp. farm improvement	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	42	36	85.71%	$61,775
p.a. avg. expenditure for each horse for which product/service was purchased				$46.34

Annual exp. boarding services	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MUCH
Owners who pay boarding fees	43	9	20.93%	
Number of horses boarded/mthly fee	1333	24	1.80%	$2,955
Average monthly fee per boarded horse				$123.13

BREEDERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 43

Participation Categories	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	43	10	23.26%
farm, stable or ranch manager	43	27	62.79%
breeder	43	42	97.67%
service provider	43	2	4.65%
pleasure rider	43	34	79.07%
competitor	43	21	48.84%
show organizer, judge, official	43	18	41.86%
product or service supplier	43	10	23.26%
TOTALS	**43**	**164**	**381.40%**

Primary Participation Category	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	43	0	0.00%
farm, stable or ranch manager	43	0	0.00%
breeder	43	43	100.00%
service provider	43	0	0.00%
pleasure rider	43	0	0.00%
competitor	43	0	0.00%
show organizer, judge, official	43	0	0.00%
product or service supplier	43	0	0.00%
TOTALS	**43**	**43**	**100.00%**

Offer coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from coaching services	43	5	11.63%	$4,000
# of clients				46
Avg. annual income from coaching services				$800

Offer horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from horse training services	43	3	6.98%	$67,300
Avg. annual income from horse training services				$22,433

Pay to haul horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	43	14	32.56%	$11,650
Average annual expenditure for each horse hauled				$271

Purchase coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	43	13	30.23%	$7,600
Average per annum expenditure per coaching student				$585

Purchase horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	43	21	48.84%	$67,300
Average per annum expenditure per training services client				$3,542

Competitor	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	43	23	53.49%

Competitions entered in 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	23	23	100.00%	179
Average # of competitions per competitor				7.78

Sport / competition disciplines	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Western Pleasure	23	5	21.74%
Team Cattle Penning	23	2	8.70%
Dressage	23	4	17.39%
Barrel Racing / Pole Bending	23	1	4.35%
Hunter / Jumper	23	1	4.35%
Halter/ Line Classes	23	7	30.43%
Reining	23	4	17.39%
Roping (including team roping)	23	1	4.35%
Driving	23	5	21.74%
Cutting	23	2	8.70%
Racing	23	1	4.35%
Gymkhana	23	1	4.35%
Rodeo	23	1	4.35%
Other (not listed)	23	1	4.35%
Endurance Riding	23	0	0.00%
Saddleseat	23	0	0.00%
Chuck wagon racing	23	1	4.35%
Eventing	23	0	0.00%
Polo	23	0	0.00%
TOTALS		**37**	**160.87%**

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 43

Entered More or less shows than 2000	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	23	7	30.43%
LESS	23	9	39.13%
THE SAME #	23	7	30.43%

Expect to enter in 2002 compared 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	23	14	60.87%
LESS	23	0	0.00%
THE SAME #	23	9	39.13%

Cost to compete 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	23	17	73.91%	$33,150
Average cost per competitor				$1,950
Average cost per show				$185

Regularly ride on public lands	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	43	7	16.28%

Would ride on public lands if avail.	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	36	19	52.78%

Volunteer hours on club activities	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	43	38	88.37%	2,791
Average hours per volunteer				73.45

Wishes to participate in focus group	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	43	34	79.07%

SERVICE PROVIDERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 7

Respondents per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	355	58	16.34%
Region 2	355	30	8.45%
Region 3	355	57	16.06%
Region 4	355	27	7.61%
Region 5	355	53	14.93%
Region 6	355	23	6.48%
Region 7	355	61	17.18%
Region 8	355	46	12.96%

Gender	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Female	7	3	42.86%
Male	7	4	57.14%

Age Group:	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
18 to 19	7	0	0.00%	
20 to 29	7	2	28.57%	
30 to 39	7	3	42.86%	
40 to 49	**7**	**1**	**14.29%**	**MEDIAN**
50 to 59	7	1	14.29%	
Over 60	7	0	0.00%	

Attended College or University	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	7	5	71.43%
NO	7	2	28.57%

Annual Household Income	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
Less than $40,000 per year	7	1	14.29%	
$40,000 to $60,000 per year	**7**	**5**	**71.43%**	**MEDIAN**
$60,000 to $80,000 per year	7	0	0.00%	
$80,000 to $100,000 per year	7	1	14.29%	
Over $100,000 per year	7	0	0.00%	

% of Annual income from Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
>50% of personal annual income	7	3	42.86%
>50% of household annual income	7	2	28.57%

How long riding/driving horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't ride or drive	7	1	14.29%
Less than 5 years	7	0	0.00%
Five to 10 years	7	0	0.00%
More than 10 years	7	6	85.71%

Adults in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	7	7	100.00%	13
Adults in household who ride ...				8
Average # of adults per household who ride				1.14

Children in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	7	3	42.86%	3
Children in household who ride ...				2
Average # of children per household who ride ...				0.67

Member of Club or Association	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	7	5	71.43%	13
Average # of clubs per member				2.60
Volunteer hours per year on club activities				823
Average # of volunteer hours per member				164.60

Live on same property as horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	7	6	85.71%	
Total acreage all properties				1,279
Average # of acres per property				213
Average # of acres per horse				41

Employ people to care for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	6	2	33.33%	11
# of non-family full-time employees				0.28
Average # non-family employees per employer				0.14

See need for standardized staff training	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	2	2	100.00%

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 7

Use the Internet	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	7	5	71.43%
Non users who expect to use in next year	2	1	50.00%
Have E-mail	5	4	80.00%

Own computers	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	7	5	71.43%
Expect to purchase within 1 year	2	0	0.00%

Carry liability insurance for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	7	4	57.14%

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	7	7	100.00%	31
Non-owners, expect to own in 5 yrs	0	0	0.00%	
Average # of horses owned				4.43

Own horses through syndicate	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	7	1	14.29%	2.00
Average "equivalent horses" owned				2.00

How long owned horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't own horses	7	0	0.00%
Less than 5 years	7	0	0.00%
Five to 10 years	7	3	42.86%
More than 10 years	7	4	57.14%

Own more/less horses than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
MORE	7	3	42.86%	11
LESS	7	4	57.14%	14
THE SAME #	7	0	0.00%	
Net increase/decrease in herd size			-9.68%	-3

Care for other peoples' horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	7	1	14.29%	4
Average # of other peoples' horses cared for				4

Horses expected to own in 5 yrs	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	7	4	57.14%
LESS	7	0	0.00%
THE SAME #	7	3	42.86%
Non-owners who expect to own	0	0	0.00%

Other people ride their horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	7	1	14.29%	
# of horses ridden by other people	31	1	3.23%	
# of people riding				20
# of adults				8
# of children				12
Average # of riders per year per horse in use				20.0

More or less people than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	1	1	100.00%
LESS	1	0	0.00%
THE SAME #	1	0	0.00%

Sell Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	7	5	71.43%	8
Horses sold to riding/driving market	8	8	100.00%	
Horses sold to meat market	8	0	0.00%	

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Investment to purchase	31	$55,800	$1,800.00

Capital invested tack & equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Tack & harness	31	$45,500	$1,467.74

Capital invested horse equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse business equipment	31	$83,100	$2,680.65

Capital invested horse farm improvmts	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse-related farm improvements	31	$91,000	$2,935.48

SERVICE PROVIDERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 7

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	7	7	100.00%	31
Non-owners, expect to own in 5 yrs	0	0	0.00%	
			Average # of horses owned	4.43

Horses owned per participation type	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	4375	346	7.91%
farm, stable or ranch manager	4375	1343	30.70%
breeder	4375	1333	30.47%
service provider	4375	31	0.71%
pleasure rider	4375	701	16.02%
competitor	4375	420	9.60%
show organizer, judge, official	4375	137	3.13%
product or service supplier	4375	50	1.14%

Horses foaled in Saskatchewan ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	31	20	64.52%

Horses of registered stock	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	31	22	70.97%

Horses of pedigree not yet registered	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	9	3	33.33%

Herd Profile ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MANY
Mares of breeding age	31	12	38.71%	
Mares bred this season	12	7	58.33%	
Mares expected to be bred next yr.	12	7	58.33%	
Stallions at stud	31	0	0.00%	
Mares serviced in 2001	0	0		
Average # of mares per stallion	0	0.00		
Stallions providing outside stud services	0	0	0.00%	
Revenue from stud services	0			$0.00
			Average revenue per stallion	$0.00
			Average stud fee per mare	$0.00

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	
Investment to purchase	31	$55,800	
Estimated current market value	31	$133,250	
Average capital investment / horse	$1,800.00	Average mkt. value per horse	$4,298.39

PRIMARY USE ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
Racing (thoroughbred, standardbred & speed)	31	0	0.00%
Chuck wagon racing	31	0	0.00%
Competition (other than racing)	31	11	35.48%
Pleasure Riding or Driving	31	10	32.26%
Breeding Stock	31	7	22.58%
Riding lessons	31	0	0.00%
Commercial trail, sleigh rides / tourists	31	0	0.00%
Work (ranching, logging, farming, etc.)	31	3	9.68%
Companionship or full retirement	31	0	0.00%
PMU production (pregnant mare urine)	31	0	0.00%
Meat production	31	0	0.00%
Other	31	0	0.00%

NOTE: The number of horses in PMU production distorts % ratios. Refer to Profile Pg. 9

Annual expenditure forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	7	5	71.43%	$5,750
p.a. avg. expenditure for each horse for which product/service was purchased				$185.48

Annual exp. non-forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	7	4	57.14%	$2,225
p.a. avg. expenditure for each horse for which product/service was purchased				$166.92

Annual exp. health & grooming	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	7	7	100.00%	$4,100
p.a. avg. expenditure for each horse for which product/service was purchased				$143.76

Annual exp. bedding	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	7	2	28.57%	$300
per annum average expenditure for each horse purchased for				$28.46

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 7

	MAX. SAMPLE	TOTAL REPORTED	% OF SAMPLE	HOW MUCH
Annual exp. vet & prescriptions	7	7	100.00%	$6,700
p.a. avg. expenditure for each horse for which product/service was purchased				$216.13

	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Annual exp. equine dentistry	7	2	28.57%	$1,000
p.a. avg. expenditure for each horse for which product/service was purchased				$140.25

	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Annual exp. equine therapy	7	3	42.86%	$100
p.a. avg. expenditure for each horse for which product/service was purchased				$15.36
% of therapy users who have used equine chiropractic				66.67%
% of therapy users who have used equine massage				33.33%
% of therapy users who have used equine accupuncture				33.33%
% of therapy users who have used other therapies				0.00%

	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Annual exp. farrier services	7	3	42.86%	$1,400
p.a. avg. expenditure for each horse for which product/service was purchased				$58.65

	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Annual exp. replacement tack	7	7	100.00%	$1,800
p.a. avg. expenditure for each horse for which product/service was purchased				$58.06

	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Annual exp. replacement equipment	7	6	85.71%	$3,650
p.a. avg. expenditure for each horse for which product/service was purchased				$117.74

	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Annual exp. farm improvement	6	5	83.33%	$4,400
p.a. avg. expenditure for each horse for which product/service was purchased				$141.94

	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MUCH
Annual exp. boarding services				
Owners who pay boarding fees	7	1	14.29%	
Number of horses boarded/mthly fee	31	3	9.68%	$250
Average monthly fee per boarded horse				$83.33

SERVICE PROVIDERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — **PARTICIPATION / ACTIVITY PROFILE** — **Total sample size: 7**

Participation Categories	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	7	2	28.57%
farm, stable or ranch manager	7	1	14.29%
breeder	7	3	42.86%
service provider	7	6	85.71%
pleasure rider	7	3	42.86%
competitor	7	5	71.43%
show organizer, judge, official	7	0	0.00%
product or service supplier	7	3	42.86%
TOTALS	7	23	328.57%

Primary Participation Category	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	7	0	0.00%
farm, stable or ranch manager	7	0	0.00%
breeder	7	0	0.00%
service provider	7	7	100.00%
pleasure rider	7	0	0.00%
competitor	7	0	0.00%
show organizer, judge, official	7	0	0.00%
product or service supplier	7	0	0.00%
TOTALS	7	7	100.00%

Offer coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from coaching services	7	0	0.00%	$0
# of clients				0
Avg. annual income from coaching services				$0

Offer horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from horse training services	7	1	14.29%	$1,500
Avg. annual income from horse training services				$1,500

Pay to haul horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	7	0	0.00%	$0
Average annual expenditure for each horse hauled				$0

Purchase coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	7	3	42.86%	$650
Average per annum expenditure per coaching student				$217

Purchase horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	7	2	28.57%	$1,500
Average per annum expenditure per training services client				$750

Competitor	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	7	4	57.14%

Competitions entered in 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	4	4	100.00%	82
Average # of competitions per competitor				20.50

Sport / competition disciplines	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Western Pleasure	4	1	25.00%
Team Cattle Penning	4	1	25.00%
Dressage	4	1	25.00%
Barrel Racing / Pole Bending	4	1	25.00%
Hunter / Jumper	4	0	0.00%
Halter/ Line Classes	4	0	0.00%
Reining	4	0	0.00%
Roping (including team roping)	4	2	50.00%
Driving	4	0	0.00%
Cutting	4	0	0.00%
Racing	4	0	0.00%
Gymkhana	4	0	0.00%
Rodeo	4	1	25.00%
Other (not listed)	4	1	25.00%
Endurance Riding	4	0	0.00%
Saddleseat	4	0	0.00%
Chuck wagon racing	4	0	0.00%
Eventing	4	0	0.00%
Polo	4	0	0.00%
TOTALS		8	200.00%

SERVICE PROVIDERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 7

Entered More or less shows than 2000	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	4	1	25.00%
LESS	4	2	50.00%
THE SAME #	4	1	25.00%

Expect to enter in 2002 compared 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	4	3	75.00%
LESS	4	0	0.00%
THE SAME #	4	1	25.00%

Cost to compete 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	4	3	75.00%	$5,750
		Average cost per competitor		$1,917
		Average cost per show		$70

Regularly ride on public lands	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	7	2	28.57%

Would ride on public lands if avail.	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	5	3	60.00%

Volunteer hours on club activities	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	7	6	85.71%	823
		Average hours per volunteer		137.17

Wishes to participate in focus group	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	7	7	100.00%

PLEASURE RIDERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 155

Respondents per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	355	58	16.34%
Region 2	355	30	8.45%
Region 3	355	57	16.06%
Region 4	355	27	7.61%
Region 5	355	53	14.93%
Region 6	355	23	6.48%
Region 7	355	61	17.18%
Region 8	355	46	12.96%

Gender	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Female	155	115	74.19%
Male	155	40	25.81%

Age Group:	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
18 to 19	155	1	0.65%	
20 to 29	155	9	5.81%	
30 to 39	155	22	14.19%	
40 to 49	**155**	**57**	**36.77%**	**MEDIAN**
50 to 59	155	37	23.87%	
Over 60	155	28	18.06%	

Attended College or University	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	155	85	54.84%
NO	155	70	45.16%

Annual Household Income	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
Less than $40,000 per year	155	39	25.16%	
$40,000 to $60,000 per year	**155**	**46**	**29.68%**	**MEDIAN**
$60,000 to $80,000 per year	155	25	16.13%	
$80,000 to $100,000 per year	155	9	5.81%	
Over $100,000 per year	155	12	7.74%	

% of Annual Income from Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
>50% of personal annual income	155	2	1.29%
>50% of household annual income	155	1	0.65%

How long riding/driving horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't ride or drive	155	1	0.65%
Less than 5 years	155	5	3.23%
Five to 10 years	155	18	11.61%
More than 10 years	155	129	83.23%

Adults in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	155	155	100.00%	326
Adults in household who ride ...				240
Average # of adults per household who ride				1.55

Children in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	155	72	46.45%	119
Children in household who ride ...				71
Average # of children per household who ride ...				0.99

Member of Club or Association	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	155	126	81.29%	209
Average # of clubs per member				1.66
Volunteer hours per year on club activities				8,810
Average # of volunteer hours per member				69.92

Live on same property as horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	142	106	74.65%	
Total acreage all properties				60,503
Average # of acres per property				571
Average # of acres per horse				86

Employ people to care for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	106	4	3.77%	241
# of non-family full-time employees				6.03
Average # non-family employees per employer				1.51

See need for standardized staff training	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	4	3	75.00%

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 155

Use the Internet	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	155	106	68.39%
Non users who expect to use in next year	49	7	14.29%
Have E-mail	106	93	87.74%

Own computers	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	155	120	77.42%
Expect to purchase within 1 year	35	2	5.71%

Carry liability insurance for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	155	62	40.00%

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	155	142	91.61%	701
Non-owners, expect to own in 5 yrs	13	6	46.15%	
Average # of horses owned				4.94

Own horses through syndicate	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	142	4	2.82%	3.00
Average "equivalent horses" owned				0.75

How long owned horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't own horses	155	13	8.39%
Less than 5 years	142	5	3.52%
Five to 10 years	142	29	20.42%
More than 10 years	142	107	75.35%

Own more/less horses than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
MORE	142	57	40.14%	190
LESS	142	33	23.24%	131
THE SAME #	142	52	36.62%	
Net increase/decrease in herd size			8.42%	59

Care for other peoples' horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	155	20	12.90%	127
Average # of other peoples' horses cared for				6

Horses expected to own in 5 yrs	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	142	28	19.72%
LESS	142	38	26.76%
THE SAME #	142	72	50.70%
Non-owners who expect to own	13	6	46.15%

Other people ride their horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	142	32	22.54%	
# of horses ridden by other people	701	71	10.13%	
# of people riding				292
# of adults				117
# of children				175
Average # of riders per year per horse in use				4.1

More or less people than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	32	13	40.63%
LESS	32	2	6.25%
THE SAME #	32	16	50.00%

Sell Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	142	35	24.65%	56
Horses sold to riding/driving market	56	50	89.29%	
Horses sold to meat market	56	3	5.36%	

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Investment to purchase	701	$1,058,150	$1,509.49

Capital invested tack & equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Tack & hamess	701	$793,830	$1,132.43

Capital invested horse equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse business equipment	701	$795,950	$1,135.45

Capital invested horse farm improvmts	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse-related farm improvements	701	$1,481,300	$2,113.12

PLEASURE RIDERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 155

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	155	142	91.61%	701
Non-owners, expect to own in 5 yrs	13	6	46.15%	
Average # of horses owned				4.94

Horses owned per participation type	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	4375	346	7.91%
farm, stable or ranch manager	4375	1343	30.70%
breeder	4375	1333	30.47%
service provider	4375	31	0.71%
pleasure rider	4375	701	16.02%
competitor	4375	420	9.60%
show organizer, judge, official	4375	137	3.13%
product or service supplier	4375	50	1.14%

Horses foaled in Saskatchewan ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	701	570	81.31%

Horses of registered stock	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	701	425	60.63%

Horses of pedigree not yet registered	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	276	32	11.59%

Herd Profile ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MANY
Mares of breeding age	701	240	34.24%	
Mares bred this season	240	94	39.17%	
Mares expected to be bred next yr.	240	88	36.67%	
Stallions at stud	701	21	3.00%	
Mares serviced in 2001	21	60		
Average # of mares per stallion	21	2.86		
Stallions providing outside stud services	21	5	23.81%	
Revenue from stud services	5			$650.00
Average revenue per stallion				$130.00
Average stud fee per mare				$30.95

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	
Investment to purchase	701	$1,058,150	
Estimated current market value	701	$1,844,700	
Average capital investment / horse	$1,509.49	Average mkt. value per horse	$2,631.53

PRIMARY USE ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
Racing (thor'bred, standardbred & speed)	701	7	1.00%
Chuck wagon racing	701	0	0.00%
Competition (other than racing)	701	137	19.54%
Pleasure Riding or Driving	701	323	46.08%
Breeding Stock	701	99	14.12%
Riding lessons	701	14	2.00%
Commercial trail, sleigh rides / tourists	701	3	0.43%
Work (ranching, logging, farming, etc.)	701	79	11.27%
Companionship or full retirement	701	37	5.28%
PMU production (pregnant mare urine)	701	0	0.00%
Meat production	701	2	0.29%
Other	701	0	0.00%

NOTE: The number of horses in PMU production distorts % ratios. Refer to Profile Pg. 9

Annual expenditure forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	142	64	45.07%	$83,000
p.a. avg. expenditure for each horse for which product/service was purchased				$118.40

Annual exp. non-forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	142	79	55.63%	$32,480
p.a. avg. expenditure for each horse for which product/service was purchased				$107.75

Annual exp. health & grooming	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	142	133	93.66%	$63,638
p.a. avg. expenditure for each horse for which product/service was purchased				$98.68

Annual exp. bedding	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	142	55	38.73%	$10,760
per annum average expenditure for each horse purchased for				$45.15

PLEASURE RIDERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 155

Annual exp. vet & prescriptions	MAX. SAMPLE	TOTAL REPORTED	% OF SAMPLE	HOW MUCH
	142	136	95.77%	$40,500
p.a. avg. expenditure for each horse for which product/service was purchased				$57.77

Annual exp. equine dentistry	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	142	17	11.97%	$4,146
p.a. avg. expenditure for each horse for which product/service was purchased				$25.71

Annual exp. equine therapy	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	142	31	21.83%	$3,520
p.a. avg. expenditure for each horse for which product/service was purchased				$23.91
% of therapy users who have used equine chiropractic				41.94%
% of therapy users who have used equine massage				38.71%
% of therapy users who have used equine accupuncture				6.45%
% of therapy users who have used other therapies				0.00%

Annual exp. farrier services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	142	103	72.54%	$46,515
p.a. avg. expenditure for each horse for which product/service was purchased				$86.18

Annual exp. replacement tack	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	142	129	90.85%	$37,470
p.a. avg. expenditure for each horse for which product/service was purchased				$53.45

Annual exp. replacement equipment	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	142	97	68.31%	$32,110
p.a. avg. expenditure for each horse for which product/service was purchased				$45.81

Annual exp. farm improvement	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	106	90	84.91%	$37,970
p.a. avg. expenditure for each horse for which product/service was purchased				$54.17

Annual exp. boarding services	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MUCH
Owners who pay boarding fees	142	24	16.90%	
Number of horses boarded/mthly fee	701	40	5.71%	$5,655
Average monthly fee per boarded horse				$141.38

PLEASURE RIDERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 155

Participation Categories	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	155	23	14.84%
farm, stable or ranch manager	155	21	13.55%
breeder	155	29	18.71%
service provider	155	4	2.58%
pleasure rider	155	155	100.00%
competitor	155	46	29.68%
show organizer, judge, official	155	21	13.55%
product or service supplier	155	8	5.16%
TOTALS	**155**	**307**	**198.06%**

Primary Participation Category	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	155	0	0.00%
farm, stable or ranch manager	155	0	0.00%
breeder	155	0	0.00%
service provider	155	0	0.00%
pleasure rider	155	155	100.00%
competitor	155	0	0.00%
show organizer, judge, official	155	0	0.00%
product or service supplier	155	0	0.00%
TOTALS	**155**	**155**	**100.00%**

Offer coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from coaching services	155	14	9.03%	$600
# of clients				103
Avg. annual income from coaching services				$43

Offer horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from horse training services	155	9	5.81%	$32,115
Avg. annual income from horse training services				$3,568

Pay to haul horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	142	15	10.56%	$8,230
Average annual expenditure for each horse hauled				$58

Purchase coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	155	60	38.71%	$28,025
Average per annum expenditure per coaching student				$483

Purchase horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	155	27	17.42%	$32,115
Average per annum expenditure per training services client				$1,235

Competitor	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	155	56	36.13%

Competitions entered in 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	56	54	96.43%	248
Average # of competitions per competitor				4.59

Sport / competition disciplines	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Western Pleasure	56	16	28.57%
Team Cattle Penning	56	13	23.21%
Dressage	56	11	19.64%
Barrel Racing / Pole Bending	56	6	10.71%
Hunter / Jumper	56	7	12.50%
Halter/ Line Classes	56	6	10.71%
Reining	56	2	3.57%
Roping (including team roping)	56	3	5.36%
Driving	56	5	8.93%
Cutting	56	0	0.00%
Racing	56	1	1.79%
Gymkhana	56	5	8.93%
Rodeo	56	1	1.79%
Other (not listed)	56	5	8.93%
Endurance Riding	56	5	8.93%
Saddleseat	56	1	1.79%
Chuck wagon racing	56	0	0.00%
Eventing	56	0	0.00%
Polo	56	0	0.00%
TOTALS		**87**	**155.36%**

PLEASURE RIDERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 155

Entered More or less shows than 2000	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	56	8	14.29%
LESS	56	30	53.57%
THE SAME #	56	15	26.79%

Expect to enter in 2002 compared 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	56	29	51.79%
LESS	56	6	10.71%
THE SAME #	56	19	33.93%

Cost to compete 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	56	42	75.00%	$24,585
			Average cost per competitor	$585
			Average cost per show	$99

Regularly ride on public lands	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	155	65	41.94%

Would ride on public lands if avail.	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	90	53	58.89%

Volunteer hours on club activities	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	155	118	76.13%	8,810
			Average hours per volunteer	74.66

Wishes to participate in focus group	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	155	124	80.00%

COMPETITORS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 60

Respondents per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	355	58	16.34%
Region 2	355	30	8.45%
Region 3	355	57	16.06%
Region 4	355	27	7.61%
Region 5	355	53	14.93%
Region 6	355	23	6.48%
Region 7	355	61	17.18%
Region 8	355	47	13.24%

Gender	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Female	60	50	83.33%
Male	60	10	16.67%

Age Group:	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
18 to 19	60	3	5.00%	
20 to 29	60	9	15.00%	
30 to 39	60	10	16.67%	
40 to 49	**60**	**25**	**41.67%**	**MEDIAN**
50 to 59	60	9	15.00%	
Over 60	60	2	3.33%	

Attended College or University	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	60	41	68.33%
NO	60	19	31.67%

Annual Household Income	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
Less than $40,000 per year	60	13	21.67%	
$40,000 to $60,000 per year	**60**	**13**	**21.67%**	**MEDIAN**
$60,000 to $80,000 per year	60	10	16.67%	
$80,000 to $100,000 per year	60	8	13.33%	
Over $100,000 per year	60	10	16.67%	

% of Annual Income from Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
>50% of personal annual income	60	6	10.00%
>50% of household annual income	60	2	3.33%

How long riding/driving horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't ride or drive	60	1	1.67%
Less than 5 years	60	2	3.33%
Five to 10 years	60	9	15.00%
More than 10 years	60	48	80.00%

Adults in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	60	60	100.00%	120
Adults in household who ride ...				89
Average # of adults per household who ride				1.48

Children in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	60	23	38.33%	34
Children in household who ride ...				29
Average # of children per household who ride ...				1.26

Member of Club or Association	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	60	53	88.33%	150
Average # of clubs per member				2.83
Volunteer hours per year on club activities				5,771
Average # of volunteer hours per member				108.89

Live on same property as horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	60	43	71.67%	
Total acreage all properties				18,300
Average # of acres per property				426
Average # of acres per horse				44

Employ people to care for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	43	3	6.98%	41
# of non-family full-time employees				1.03
Average # non-family employees per employer				0.34

See need for standardized staff training	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	3	2	66.67%

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 60

Use the Internet	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	60	46	76.67%
Non users who expect to use in next year	14	9	64.29%
Have E-mail	46	42	91.30%

Own computers	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	60	46	76.67%
Expect to purchase within 1 year	14	4	28.57%

Carry liability insurance for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	60	34	56.67%

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	60	60	100.00%	420
Non-owners, expect to own in 5 yrs	0	0	0.00%	
Average # of horses owned				7.00

Own horses through syndicate	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	60	4	6.67%	5.00
Average "equivalent horses" owned				1.25

How long owned horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't own horses	60	0	0.00%
Less than 5 years	60	2	3.33%
Five to 10 years	60	14	23.33%
More than 10 years	60	44	73.33%

Own more/less horses than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
MORE	60	23	38.33%	98
LESS	60	23	38.33%	91
THE SAME #	60	17	28.33%	
Net increase/decrease in herd size			1.67%	7

Care for other peoples' horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	60	16	26.67%	159
Average # of other peoples' horses cared for				10

Horses expected to own in 5 yrs	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	60	18	30.00%
LESS	60	11	18.33%
THE SAME #	60	31	51.67%
Non-owners who expect to own	0	0	0.00%

Other people ride their horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	60	17	28.33%	
# of horses ridden by other people	420	46	10.95%	
# of people riding				121
# of adults				48
# of children				73
Average # of riders per year per horse in use				2.6

More or less people than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	17	13	76.47%
LESS	17	1	5.88%
THE SAME #	17	1	5.88%

Sell Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	60	25	41.67%	62
Horses sold to riding/driving market	62	52	83.87%	
Horses sold to meat market	62	4	6.45%	

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Investment to purchase	420	$630,795	$1,501.89

Capital invested tack & equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Tack & harness	420	$569,000	$1,354.76

Capital invested horse equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse business equipment	420	$988,200	$2,352.86

Capital invested horse farm improvmts	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse-related farm improvements	420	$2,181,800	$5,194.76

COMPETITORS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 60

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	60	60	100.00%	420
Non-owners, expect to own in 5 yrs	0	0	0.00%	
Average # of horses owned				7.00

Horses owned per participation type	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	4375	346	7.91%
farm, stable or ranch manager	4375	1343	30.70%
breeder	4375	1333	30.47%
service provider	4375	31	0.71%
pleasure rider	4375	701	16.02%
competitor	4375	420	9.60%
show organizer, judge, official	4375	137	3.13%
product or service supplier	4375	50	1.14%

Horses foaled in Saskatchewan ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	420	350	83.33%

Horses of registered stock	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	420	319	75.95%

Horses of pedigree not yet registered	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	101	11	10.89%

Herd Profile ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MANY
Mares of breeding age	420	156	37.14%	
Mares bred this season	156	54	34.62%	
Mares expected to be bred next yr.	156	75	48.08%	
Stallions at stud	420	16	3.81%	
Mares serviced in 2001	16	23		
Average # of mares per stallion	16	1.44		
Stallions providing outside stud services	16	5	31.25%	
Revenue from stud services	5			$2,700.00
Average revenue per stallion				$540.00
Average stud fee per mare				$168.75

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	
Investment to purchase	420	$630,795	
Estimated current market value	420	$1,532,102	
Average capital investment / horse	$1,501.89	Average mkt. value per horse	$3,647.86

PRIMARY USE ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
Racing (thor'bred, standardbred & speed)	420	6	1.43%
Chuck wagon racing	420	0	0.00%
Competition (other than racing)	420	177	42.14%
Pleasure Riding or Driving	420	87	20.71%
Breeding Stock	420	83	19.76%
Riding lessons	420	11	2.62%
Commercial trail, sleigh rides / tourists	420	3	0.71%
Work (ranching, logging, farming, etc.)	420	30	7.14%
Companionship or full retirement	420	11	2.62%
PMU production (pregnant mare urine)	420	0	0.00%
Meat production	420	0	0.00%
Other	420	12	2.86%

NOTE: The number of horses in PMU production distorts % ratios. Refer to Profile Pg. 9

Annual expenditure forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	60	31	51.67%	$51,750
p.a. avg. expenditure for each horse for which product/service was purchased				$123.21

Annual exp. non-forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	60	30	50.00%	$26,140
p.a. avg. expenditure for each horse for which product/service was purchased				$144.74

Annual exp. health & grooming	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	60	58	96.67%	$56,800
p.a. avg. expenditure for each horse for which product/service was purchased				$147.00

Annual exp. bedding	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	60	17	28.33%	$4,315
per annum average expenditure for each horse purchased for				$30.22

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 60

Annual exp. vet & prescriptions	MAX. SAMPLE	TOTAL REPORTED	% OF SAMPLE	HOW MUCH
	60	59	98.33%	$45,025
p.a. avg. expenditure for each horse for which product/service was purchased				$107.20

Annual exp. equine dentistry	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	60	12	20.00%	$3,820
p.a. avg. expenditure for each horse for which product/service was purchased				$39.54

Annual exp. equine therapy	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	60	25	41.67%	$5,240
p.a. avg. expenditure for each horse for which product/service was purchased				$59.41
% of therapy users who have used equine chiropractic				60.00%
% of therapy users who have used equine massage				48.00%
% of therapy users who have used equine accupuncture				8.00%
% of therapy users who have used other therapies				4.00%

Annual exp. farrier services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	60	51	85.00%	$36,485
p.a. avg. expenditure for each horse for which product/service was purchased				$112.82

Annual exp. replacement tack	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	60	58	96.67%	$34,620
p.a. avg. expenditure for each horse for which product/service was purchased				$82.43

Annual exp. replacement equipment	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	60	46	76.67%	$31,600
p.a. avg. expenditure for each horse for which product/service was purchased				$75.24

Annual exp. farm improvement	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	43	40	93.02%	$45,550
p.a. avg. expenditure for each horse for which product/service was purchased				$108.45

Annual exp. boarding services	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MUCH
Owners who pay boarding fees	60	21	35.00%	
Number of horses boarded/mthly fee	420	32	7.62%	$5,595
Average monthly fee per boarded horse				$174.84

COMPETITORS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 60

Participation Categories	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	60	27	45.00%
farm, stable or ranch manager	60	12	20.00%
breeder	60	18	30.00%
service provider	60	4	6.67%
pleasure rider	60	54	90.00%
competitor	60	60	100.00%
show organizer, judge, official	60	20	33.33%
product or service supplier	60	2	3.33%
TOTALS	**60**	**197**	**328.33%**

Primary Participation Category	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	60	0	0.00%
farm, stable or ranch manager	60	0	0.00%
breeder	60	0	0.00%
service provider	60	0	0.00%
pleasure rider	60	0	0.00%
competitor	60	60	100.00%
show organizer, judge, official	60	0	0.00%
product or service supplier	60	0	0.00%
TOTALS	**60**	**60**	**100.00%**

Offer coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from coaching services	60	15	25.00%	$39,640
			# of clients	149
			Avg. annual income from coaching services	$2,643

Offer horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from horse training services	60	17	28.33%	$28,690
			Avg. annual income from horse training services	$1,688

Pay to haul horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	60	11	18.33%	$10,850
			Average annual expenditure for each horse hauled	$181

Purchase coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	60	27	45.00%	$39,770
			Average per annum expenditure per coaching student	$1,530

Purchase horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	60	19	31.67%	$28,690
			Average per annum expenditure per training services client	$1,594

Competitor	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	60	60	100.00%

Competitions entered in 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	60	59	98.33%	632
			Average # of competitions per competitor	10.71

Sport / competition disciplines	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Western Pleasure	60	23	38.33%
Team Cattle Penning	60	12	20.00%
Dressage	60	13	21.67%
Barrel Racing / Pole Bending	60	19	31.67%
Hunter / Jumper	60	13	21.67%
Halter/ Line Classes	60	7	11.67%
Reining	60	9	15.00%
Roping (including team roping)	60	4	6.67%
Driving	60	2	3.33%
Cutting	60	3	5.00%
Racing	60	2	3.33%
Gymkhana	60	4	6.67%
Rodeo	60	7	11.67%
Other (not listed)	60	5	8.33%
Endurance Riding	60	1	1.67%
Saddleseat	60	3	5.00%
Chuck wagon racing	60	0	0.00%
Eventing	60	0	0.00%
Polo	60	0	0.00%
TOTALS		**127**	**211.67%**

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY | PARTICIPATION / ACTIVITY PROFILE | Total sample size: 60

Entered More or less shows than 2000	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	60	18	30.00%
LESS	60	24	40.00%
THE SAME #	60	16	26.67%

Expect to enter in 2002 compared 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	60	33	55.00%
LESS	60	6	10.00%
THE SAME #	60	21	35.00%

Cost to compete 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	60	49	81.67%	$125,395
			Average cost per competitor	$2,559
			Average cost per show	$198

Regularly ride on public lands	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	60	21	35.00%

Would ride on public lands if avail.	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	39	26	66.67%

Volunteer hours on club activities	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	60	51	85.00%	5,771
			Average hours per volunteer	113.16

Wishes to participate in focus group	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	60	52	86.67%

SHOW ORGANIZERS OR OFFICIALS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 13

Respondents per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	355	58	16.34%
Region 2	355	30	8.45%
Region 3	355	57	16.06%
Region 4	355	27	7.61%
Region 5	355	53	14.93%
Region 6	355	23	6.48%
Region 7	355	60	16.90%
Region 8	355	47	13.24%

Gender	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Female	13	7	53.85%
Male	13	6	46.15%

Age Group:	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
18 to 19	13	0	0.00%	
20 to 29	13	0	0.00%	
30 to 39	13	1	7.69%	
40 to 49	**13**	**5**	**38.46%**	**MEDIAN**
50 to 59	13	5	38.46%	
Over 60	13	2	15.38%	

Attended College or University	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	13	3	23.08%
NO	13	10	76.92%

Annual Household Income	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
Less than $40,000 per year	13	2	15.38%	
$40,000 to $60,000 per year	**13**	**7**	**53.85%**	**MEDIAN**
$60,000 to $80,000 per year	13	0	0.00%	
$80,000 to $100,000 per year	13	1	7.69%	
Over $100,000 per year	13	1	7.69%	

% of Annual Income from Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
>50% of personal annual income	13	2	15.38%
>50% of household annual income	13	1	7.69%

How long riding/driving horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't ride or drive	13	2	15.38%
Less than 5 years	13	0	0.00%
Five to 10 years	13	0	0.00%
More than 10 years	13	11	84.62%

Adults in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	13	13	100.00%	29
Adults in household who ride ...				22
Average # of adults per household who ride				1.69

Children in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	13	4	30.77%	4
Children in household who ride ...				4
Average # of children per household who ride ...				1.00

Member of Club or Association	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	13	12	92.31%	30
Average # of clubs per member				2.50
Volunteer hours per year on club activities				1,585
Average # of volunteer hours per member				132.08

Live on same property as horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	10	8	80.00%	
Total acreage all properties				4,035
Average # of acres per property				504
Average # of acres per horse				29

Employ people to care for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	8	1	12.50%	50
# of non-family full-time employees				1.25
Average # non-family employees per employer				1.25

See need for standardized staff training	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	1	1	100.00%

SHOW ORGANIZERS OR OFFICIALS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 13

Use the Internet	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	13	6	46.15%
Non users who expect to use in next year	7	4	57.14%
Have E-mail	6	6	100.00%

Own computers	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	13	6	46.15%
Expect to purchase within 1 year	7	3	42.86%

Carry liability insurance for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	13	6	46.15%

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	13	10	76.92%	137
Non-owners, expect to own in 5 yrs	3	0	0.00%	
Average # of horses owned				13.70

Own horses through syndicate	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	10	1	10.00%	1.00
Average "equivalent horses" owned				1.00

How long owned horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't own horses	13	3	23.08%
Less than 5 years	10	0	0.00%
Five to 10 years	10	0	0.00%
More than 10 years	10	10	100.00%

Own more/less horses than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
MORE	10	4	40.00%	60
LESS	10	2	20.00%	10
THE SAME #	10	4	40.00%	
Net increase/decrease in herd size			36.50%	50

Care for other peoples' horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	13	2	15.38%	3
Average # of other peoples' horses cared for				2

Horses expected to own in 5 yrs	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	10	3	30.00%
LESS	10	3	30.00%
THE SAME #	10	4	40.00%
Non-owners who expect to own	3	0	0.00%

Other people ride their horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	10	0	0.00%	
# of horses ridden by other people	137	0	0.00%	
# of people riding				0
# of adults				0
# of children				0
Average # of riders per year per horse in use				0.00

More or less people than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	0	0	0.00
LESS	0	0	0.00
THE SAME #	0	0	0.00

Sell Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	10	6	60.00%	19
Horses sold to riding/driving market	19	18	94.74%	
Horses sold to meat market	19	0	0.00%	

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Investment to purchase	137	$112,800	$823.36

Capital invested tack & equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Tack & harness	137	$58,500	$427.01

Capital invested horse equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse business equipment	137	$81,250	$593.07

Capital invested horse farm improvmts	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse-related farm improvements	137	$129,000	$941.61

SHOW ORGANIZERS OR OFFICIALS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 13

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	13	10	76.92%	137
Non-owners, expect to own in 5 yrs	3	0	0.00%	
Average # of horses owned				13.70

Horses owned per participation type	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	4375	346	7.91%
farm, stable or ranch manager	4375	1343	30.70%
breeder	4375	1333	30.47%
service provider	4375	31	0.71%
pleasure rider	4375	701	16.02%
competitor	4375	420	9.60%
show organizer, judge, official	4375	137	3.13%
product or service supplier	4375	50	1.14%

Horses foaled in Saskatchewan ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	137	123	89.78%

Horses of registered stock	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	137	116	84.67%

Horses of pedigree not yet registered	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	21	4	19.05%

Herd Profile ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MANY
Mares of breeding age	137	48	35.04%	
Mares bred this season	48	20	41.67%	
Mares expected to be bred next yr.	48	26	54.17%	
Stallions at stud	137	6	4.38%	
Mares serviced in 2001	6	24		
Average # of mares per stallion	6	4.00		
Stallions providing outside stud services	6	2	33.33%	
Revenue from stud services	2			$2,000.00
Average revenue per stallion				$1,000.00
Average stud fee per mare				$333.33

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	
Investment to purchase	137	$112,800	
Estimated current market value	137	$295,300	
Average capital investment / horse	$823.36	Average mkt. value per horse	$2,155.47

PRIMARY USE ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
Racing (thor'bred, standardbred & speed)	137	0	0.00%
Chuck wagon racing	137	0	0.00%
Competition (other than racing)	137	55	40.15%
Pleasure Riding or Driving	137	9	6.57%
Breeding Stock	137	31	22.63%
Riding lessons	137	0	0.00%
Commercial trail, sleigh rides / tourists	137	6	4.38%
Work (ranching, logging, farming, etc.)	137	11	8.03%
Companionship or full retirement	137	11	8.03%
PMU production (pregnant mare urine)	137	13	9.49%
Meat production	137	0	0.00%
Other	137	1	0.73%

NOTE: The number of horses in PMU production distorts % ratios. Refer to Profile Pg. 9

Annual expenditure forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	10	4	40.00%	$13,700
p.a. avg. expenditure for each horse for which product/service was purchased				$100.00

Annual exp. non-forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	10	7	70.00%	$940
p.a. avg. expenditure for each horse for which product/service was purchased				$15.96

Annual exp. health & grooming	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	10	10	100.00%	$6,380
p.a. avg. expenditure for each horse for which product/service was purchased				$50.62

Annual exp. bedding	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	10	6	60.00%	$5,650
per annum average expenditure for each horse purchased for				$121.30

SHOW ORGANIZERS OR OFFICIALS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 13

Annual exp. vet & prescriptions	MAX. SAMPLE	TOTAL REPORTED	% OF SAMPLE	HOW MUCH
	10	10	100.00%	$6,770
p.a. avg. expenditure for each horse for which product/service was purchased				$49.42

Annual exp. equine dentistry	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	10	1	10.00%	$200
p.a. avg. expenditure for each horse for which product/service was purchased				$6.35

Annual exp. equine therapy	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	10	4	40.00%	$275
p.a. avg. expenditure for each horse for which product/service was purchased				$9.56
% of therapy users who have used equine chiropractic				50.00%
% of therapy users who have used equine massage				25.00%
% of therapy users who have used equine accupuncture				0.00%
% of therapy users who have used other therapies				0.00%

Annual exp. farrier services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	10	10	100.00%	$4,930
p.a. avg. expenditure for each horse for which product/service was purchased				$46.73

Annual exp. replacement tack	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	10	9	90.00%	$2,100
p.a. avg. expenditure for each horse for which product/service was purchased				$15.33

Annual exp. replacement equipment	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	10	6	60.00%	$2,400
p.a. avg. expenditure for each horse for which product/service was purchased				$17.52

Annual exp. farm improvement	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	8	5	62.50%	$4,975
p.a. avg. expenditure for each horse for which product/service was purchased				$36.31

Annual exp. boarding services	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MUCH
Owners who pay boarding fees	10	2	20.00%	
Number of horses boarded/mthly fee	137	3	2.19%	$175
Average monthly fee per boarded horse				$58.33

SHOW ORGANIZERS OR OFFICIALS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 13

Participation Categories	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	13	4	30.77%
farm, stable or ranch manager	13	5	38.46%
breeder	13	2	15.38%
service provider	13	2	15.38%
pleasure rider	13	11	84.62%
competitor	13	5	38.46%
show organizer, judge, official	13	13	100.00%
product or service supplier	13	2	15.38%
TOTALS	**13**	**44**	**338.46%**

Primary Participation Category	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	13	0	0.00%
farm, stable or ranch manager	13	0	0.00%
breeder	13	0	0.00%
service provider	13	0	0.00%
pleasure rider	13	0	0.00%
competitor	13	0	0.00%
show organizer, judge, official	13	13	100.00%
product or service supplier	13	0	0.00%
TOTALS	**13**	**13**	**100.00%**

Offer coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from coaching services	13	1	7.69%	$0
			# of clients	0
			Avg. annual income from coaching services	$0

Offer horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from horse training services	13	3	23.08%	$3,000
			Avg. annual income from horse training services	$1,000

Pay to haul horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	10	1	10.00%	$120
			Average annual expenditure for each horse hauled	$12

Purchase coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	13	4	30.77%	$2,000
			Average per annum expenditure per coaching student	$500

Purchase horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	13	1	7.69%	$3,000
			Average per annum expenditure per training services client	$3,000

Competitor	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	13	4	30.77%

Competitions entered in 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	4	4	100.00%	14
			Average # of competitions per competitor	3.50

Sport / competition disciplines	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Western Pleasure	4	2	50.00%
Team Cattle Penning	4	1	25.00%
Dressage	4	1	25.00%
Barrel Racing / Pole Bending	4	2	50.00%
Hunter / Jumper	4	2	50.00%
Halter/ Line Classes	4	2	50.00%
Reining	4	2	50.00%
Roping (including team roping)	4	0	0.00%
Driving	4	1	25.00%
Cutting	4	0	0.00%
Racing	4	0	0.00%
Gymkhana	4	3	75.00%
Rodeo	4	1	25.00%
Other (not listed)	4	1	25.00%
Endurance Riding	4	1	25.00%
Saddleseat	4	1	25.00%
Chuck wagon racing	4	0	0.00%
Eventing	4	0	0.00%
Polo	4	0	0.00%
TOTALS		**20**	**500.00%**

SHOW ORGANIZERS OR OFFICIALS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 13

Entered More or less shows than 2000	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	4	1	25.00%
LESS	4	3	75.00%
THE SAME #	4	0	0.00%

Expect to enter in 2002 compared 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	4	2	50.00%
LESS	4	0	0.00%
THE SAME #	4	2	50.00%

Cost to compete 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	4	2	50.00%	$810
			Average cost per competitor	$405
			Average cost per show	$58

Regularly ride on public lands	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	13	4	30.77%

Would ride on public lands if avail.	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	9	4	44.44%

Volunteer hours on club activities	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	13	12	92.31%	1,585
			Average hours per volunteer	132.08

Wishes to participate in focus group	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	13	11	84.62%

PRODUCT SUPPLIERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 5

Respondents per region	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Region 1	355	58	16.34%
Region 2	355	30	8.45%
Region 3	355	57	16.06%
Region 4	355	27	7.61%
Region 5	355	53	14.93%
Region 6	355	23	6.48%
Region 7	355	60	16.90%
Region 8	355	47	13.24%

Gender	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Female	5	4	80.00%
Male	5	1	20.00%

Age Group:	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
18 to 19	5	0	0.00%	
20 to 29	5	1	20.00%	
30 to 39	5	1	20.00%	
40 to 49	**5**	**2**	**40.00%**	**MEDIAN**
50 to 59	5	1	20.00%	
Over 60	5	0	0.00%	

Attended College or University	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	5	2	40.00%
NO	5	3	60.00%

Annual Household Income	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	MEDIAN
Less than $40,000 per year	5	2	40.00%	
$40,000 to $60,000 per year	**5**	**2**	**40.00%**	**MEDIAN**
$60,000 to $80,000 per year	5	1	20.00%	
$80,000 to $100,000 per year	5	0	0.00%	
Over $100,000 per year	5	0	0.00%	

% of Annual Income from Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
>50% of personal annual income	5	2	40.00%
>50% of household annual income	5	0	0.00%

How long riding/driving horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't ride or drive	5	0	0.00%
Less than 5 years	5	0	0.00%
Five to 10 years	5	0	0.00%
More than 10 years	5	5	100.00%

Adults in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	5	5	100.00%	10
Adults in household who ride ...				9
Average # of adults per household who ride				1.80

Children in the household ...	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	5	3	60.00%	6
Children in household who ride ...				3
Average # of children per household who ride ...				1.00

Member of Club or Association	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	5	5	100.00%	16
Average # of clubs per member				3.20
Volunteer hours per year on club activities				1,070
Average # of volunteer hours per member				214.00

Live on same property as horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	5	5	100.00%	
Total acreage all properties				4,387
Average # of acres per property				877
Average # of acres per horse				88

Employ people to care for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	5	0	0.00%	0
# of non-family full-time employees				0.00
Average # non-family employees per employer				0.00

See need for standardized staff training	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	0	0	0.00

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PEOPLE PROFILE — Total sample size: 5

Use the Internet	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	5	3	60.00%
Non users who expect to use in next year	2	2	100.00%
Have E-mail	3	3	100.00%

Own computers	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	5	4	80.00%
Expect to purchase within 1 year	1	1	100.00%

Carry liability insurance for horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	5	3	60.00%

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	5	5	100.00%	50
Non-owners, expect to own in 5 yrs	0	0	0.00%	
Average # of horses owned				10.00

Own horses through syndicate	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	5	0	0.00%	0.00
Average "equivalent horses" owned				0.00

How long owned horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Don't own horses	5	0	0.00%
Less than 5 years	5	0	0.00%
Five to 10 years	5	1	20.00%
More than 10 years	5	4	80.00%

Own more/less horses than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
MORE	5	2	40.00%	27
LESS	5	2	40.00%	13
THE SAME #	5	1	20.00%	
Net increase/decrease in herd size			28.00%	14

Care for other peoples' horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	5	3	60.00%	142
Average # of other peoples' horses cared for				47

Horses expected to own in 5 yrs	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	5	2	40.00%
LESS	5	0	0.00%
THE SAME #	5	3	60.00%
Non-owners who expect to own	0	0	0.00%

Other people ride their horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	5	1	20.00%	
# of horses ridden by other people	50	6	12.00%	
# of people riding				15
# of adults				6
# of children				9
Average # of riders per year per horse in use				2.5

More or less people than 5 yrs ago	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	1	1	100.00%
LESS	1	0	0.00%
THE SAME #	1	0	0.00%

Sell Horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	5	3	60.00%	20
Horses sold to riding/driving market	20	20	100.00%	
Horses sold to meat market	20	0	0.00%	

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Investment to purchase	50	$116,100	$2,322.00

Capital invested tack & equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Tack & harness	50	$22,000	$440.00

Capital invested horse equipment	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse business equipment	50	$52,100	$1,042.00

Capital invested horse farm improvmts	MAX. SAMPLE	TOTAL REPORTED	AVG. PER HORSE
Horse-related farm improvements	50	$45,000	$900.00

PRODUCT SUPPLIERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 5

Own horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	5	5	100.00%	50
Non-owners, expect to own in 5 yrs	0	0	0.00%	
Average # of horses owned				10.00

Horses owned per participation type	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	4375	346	7.91%
farm, stable or ranch manager	4375	1343	30.70%
breeder	4375	1333	30.47%
service provider	4375	31	0.71%
pleasure rider	4375	701	16.02%
competitor	4375	420	9.60%
show organizer, judge, official	4375	137	3.13%
product or service supplier	4375	50	1.14%

Horses foaled in Saskatchewan ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	50	35	70.00%

Horses of registered stock	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	50	45	90.00%

Horses of pedigree not yet registered	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
YES	5	2	40.00%

Herd Profile ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MANY
Mares of breeding age	50	29	58.00%	
Mares bred this season	29	20	68.97%	
Mares expected to be bred next yr	29	27	93.10%	
Stallions at stud	50	2	4.00%	
Mares serviced in 2001	2	36		
Average # of mares per stallion	2	18.00		
Stallions providing outside stud services	2	1	50.00%	
Revenue from stud services	1			$0.00
Average revenue per stallion				$0.00
Average stud fee per mare				$0.00

Capital investment in horses	MAX. SAMPLE	TOTAL REPORTED		
Investment to purchase	50	$116,100		
Estimated current market value	50	$193,000		
Average capital investment / horse	$2,322.00	Average mkt. value per horse		$3,860.00

PRIMARY USE ...	MAX. SAMPLE	# OF HORSES	% OF SAMPLE
Racing (thor'bred, standardbred & speed)	50	0	0.00%
Chuck wagon racing	50	0	0.00%
Competition (other than racing)	50	6	12.00%
Pleasure Riding or Driving	50	13	26.00%
Breeding Stock	50	25	50.00%
Riding lessons	50	2	4.00%
Commercial trail, sleigh rides / tourists	50	0	0.00%
Work (ranching, logging, farming, etc.)	50	2	4.00%
Companionship or full retirement	50	0	0.00%
PMU production (pregnant mare urine)	50	0	0.00%
Meat production	50	0	0.00%
Other	50	2	4.00%

NOTE: The number of horses in PMU production distorts % ratios. Refer to Profile Pg. 9

Annual expenditure forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	5	2	40.00%	$2,700
p.a. avg. expenditure for each horse for which product/service was purchased				$54.00

Annual exp. non-forage feed	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	5	2	40.00%	$360
p.a. avg. expenditure for each horse for which product/service was purchased				$16.74

Annual exp. health & grooming	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	5	5	100.00%	$6,550
p.a. avg. expenditure for each horse for which product/service was purchased				$142.39

Annual exp. bedding	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	5	3	60.00%	$1,000
per annum average expenditure for each horse purchased for				$58.82

PRODUCT SUPPLIERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — HORSE HERD PROFILE — Total sample size: 5

Annual exp. vet & prescriptions	MAX. SAMPLE	TOTAL REPORTED	% OF SAMPLE	HOW MUCH
	5	5	100.00%	$6,430
p.a. avg. expenditure for each horse for which product/service was purchased				$128.60

Annual exp. equine dentistry	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	5	1	20.00%	$400
p.a. avg. expenditure for each horse for which product/service was purchased				$34.78

Annual exp. equine therapy	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	5	1	20.00%	$50
p.a. avg. expenditure for each horse for which product/service was purchased				$4.76
% of therapy users who have used equine chiropractic				0.00%
% of therapy users who have used equine massage				100.00%
% of therapy users who have used equine accupuncture				0.00%
% of therapy users who have used other therapies				0.00%

Annual exp. farrier services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	5	3	60.00%	$1,850
p.a. avg. expenditure for each horse for which product/service was purchased				$48.05

Annual exp. replacement tack	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	5	4	80.00%	$5,500
p.a. avg. expenditure for each horse for which product/service was purchased				$110.00

Annual exp. replacement equipment	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	5	1	20.00%	$1,500
p.a. avg. expenditure for each horse for which product/service was purchased				$30.00

Annual exp. farm improvement	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	5	2	40.00%	$2,500
p.a. avg. expenditure for each horse for which product/service was purchased				$50.00

Annual exp. boarding services	MAX. SAMPLE	# OF HORSES	% OF SAMPLE	HOW MUCH
Owners who pay boarding fees	5	0	0.00%	
Number of horses boarded/mthly fee	50	0	0.00%	$0
Average monthly fee per boarded horse				0.00

PRODUCT SUPPLIERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY — PARTICIPATION / ACTIVITY PROFILE — Total sample size: 5

Participation Categories	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	5	3	60.00%
farm, stable or ranch manager	5	3	60.00%
breeder	5	3	60.00%
service provider	5	0	0.00%
pleasure rider	5	5	100.00%
competitor	5	2	40.00%
show organizer, judge, official	5	3	60.00%
product or service supplier	5	4	80.00%
TOTALS	5	23	460.00%

Primary Participation Category	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
coach, instructor or trainer	5	0	0.00%
farm, stable or ranch manager	5	0	0.00%
breeder	5	0	0.00%
service provider	5	0	0.00%
pleasure rider	5	0	0.00%
competitor	5	0	0.00%
show organizer, judge, official	5	0	0.00%
product or service supplier	5	5	100.00%
TOTALS	5	5	100.00%

Offer coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from coaching services	5	2	40.00%	$1,000
# of clients				7
Avg. annual income from coaching services				$500

Offer horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
Earn income from horse training services	5	1	20.00%	$11,300
Avg. annual income from horse training services				$11,300

Pay to haul horses	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
	5	1	20.00%	$600
Average annual expenditure for each horse hauled				$120

Purchase coaching services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	5	2	40.00%	$2,650
Average per annum expenditure per coaching student				$1,325

Purchase horse training services	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	5	4	80.00%	$11,300
Average per annum expenditure per training services client				$2,825

Competitor	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	5	2	40.00%

Competitions entered in 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	2	2	100.00%	10
Average # of competitions per competitor				5.00

Sport / competition disciplines	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
Western Pleasure	2	0	0.00%
Team Cattle Penning	2	1	50.00%
Dressage	2	0	0.00%
Barrel Racing / Pole Bending	2	0	0.00%
Hunter / Jumper	2	0	0.00%
Halter/ Line Classes	2	0	0.00%
Reining	2	1	50.00%
Roping (including team roping)	2	0	0.00%
Driving	2	0	0.00%
Cutting	2	1	50.00%
Racing	2	0	0.00%
Gymkhana	2	0	0.00%
Rodeo	2	0	0.00%
Other (not listed)	2	0	0.00%
Endurance Riding	2	0	0.00%
Saddleseat	2	0	0.00%
Chuck wagon racing	2	0	0.00%
Eventing	2	0	0.00%
Polo	2	0	0.00%
TOTALS		3	150.00%

PRODUCT SUPPLIERS

SASKATCHEWAN HORSE INDUSTRY MARKET PROFILE STUDY | PARTICIPATION / ACTIVITY PROFILE | Total sample size: 5

Entered More or less shows than 2000	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	2	2	100.00%
LESS	2	0	0.00%
THE SAME #	2	0	0.00%

Expect to enter in 2002 compared 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
MORE	2	2	100.00%
LESS	2	0	0.00%
THE SAME #	2	0	0.00%

Cost to compete 2001	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MUCH
YES	2	2	100.00%	$4,500
			Average cost per competitor	$2,250
			Average cost per show	$450

Regularly ride on public lands	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	5	2	40.00%

Would ride on public lands if avail.	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	3	2	66.67%

Volunteer hours on club activities	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE	HOW MANY
YES	5	4	80.00%	1,070
			Average hours per volunteer	267.50

Wishes to participate in focus group	MAX. SAMPLE	# OF RESPONSES	% OF SAMPLE
YES	5	4	80.00%